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THE UNIVERSITY OF ALBERTA

INTERORGANIZATIONAL RELATIONS BETWEEN
MUNICIPAL AND SCHOOL AUTHORITIES SHARING
EDUCATIONAL AND RECREATIONAL FACILITIES

by



AVI HABINSKI

A THESIS

SUBMITTED TO THE FACULTY OF GRADUATE STUDIES AND RESEARCH
IN PARTIAL FULFILMENT OF THE REQUIREMENTS FOR THE DEGREE
OF DOCTOR OF PHILOSOPHY

DEPARTMENT OF EDUCATIONAL ADMINISTRATION

EDMONTON, ALBERTA

SPRING, 1987

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CITY SOLICITOR

A. KONYE - CITY SOLICITOR

8th Floor, City Hall
1, Sir Winston Churchill Square
Edmonton, Alberta
T5J 2R7

July 31, 1986

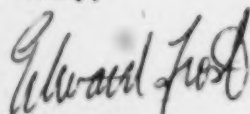
Avi Halinski
5304 - 174 Street
Edmonton, Alberta
T6M 1H9

Dear Avi:

Thank you for your letter of July 30, 1986.

On behalf of the City I wish to indicate that it is in order for you to use the information shown on the attached documents in your research and in your dissertation.

Yours truly,

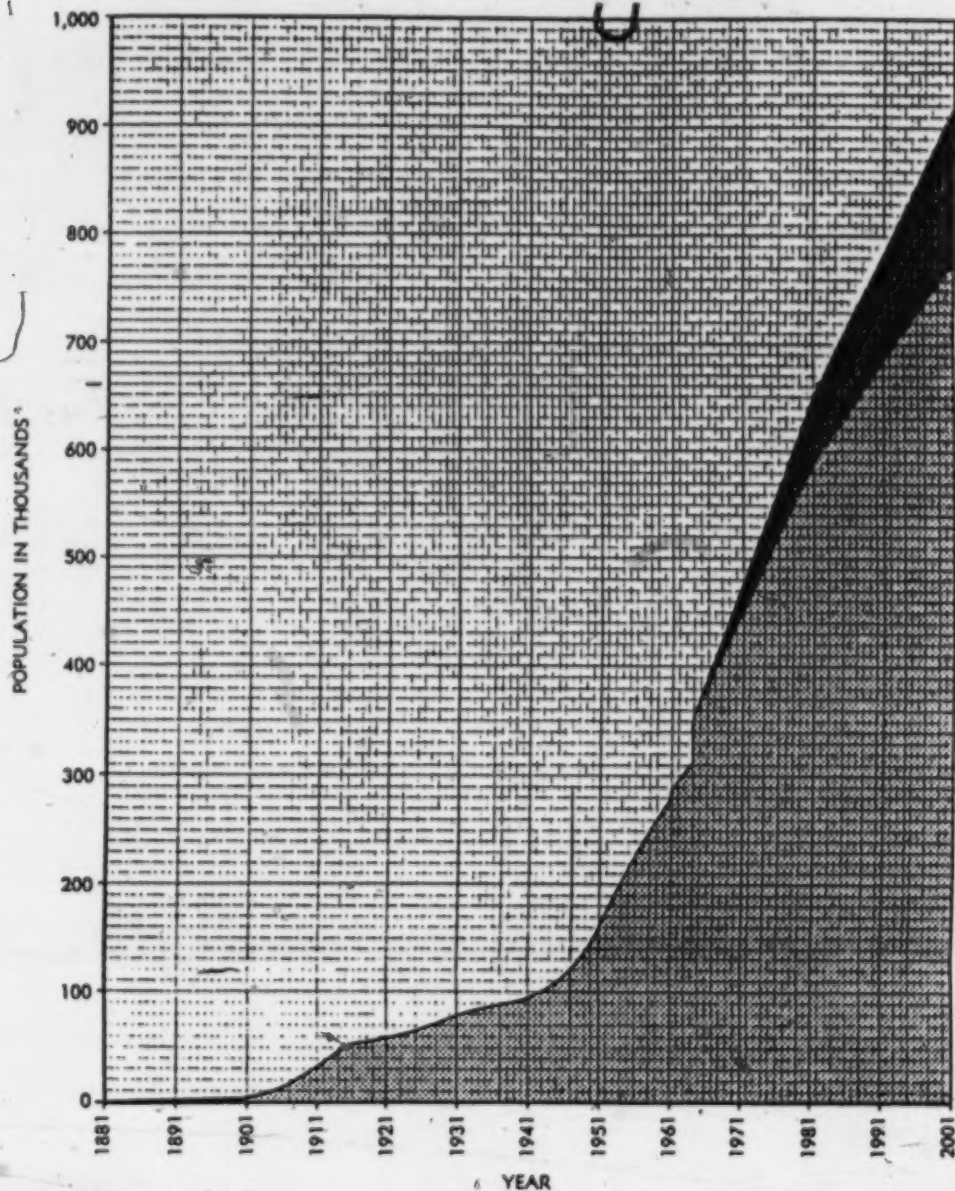


C. Edward Frost
Barrister & Solicitor
Phone: 428-3495

/lab

FIGURE 1

Actual and Projected Population in the City of Edmonton 1881-2001



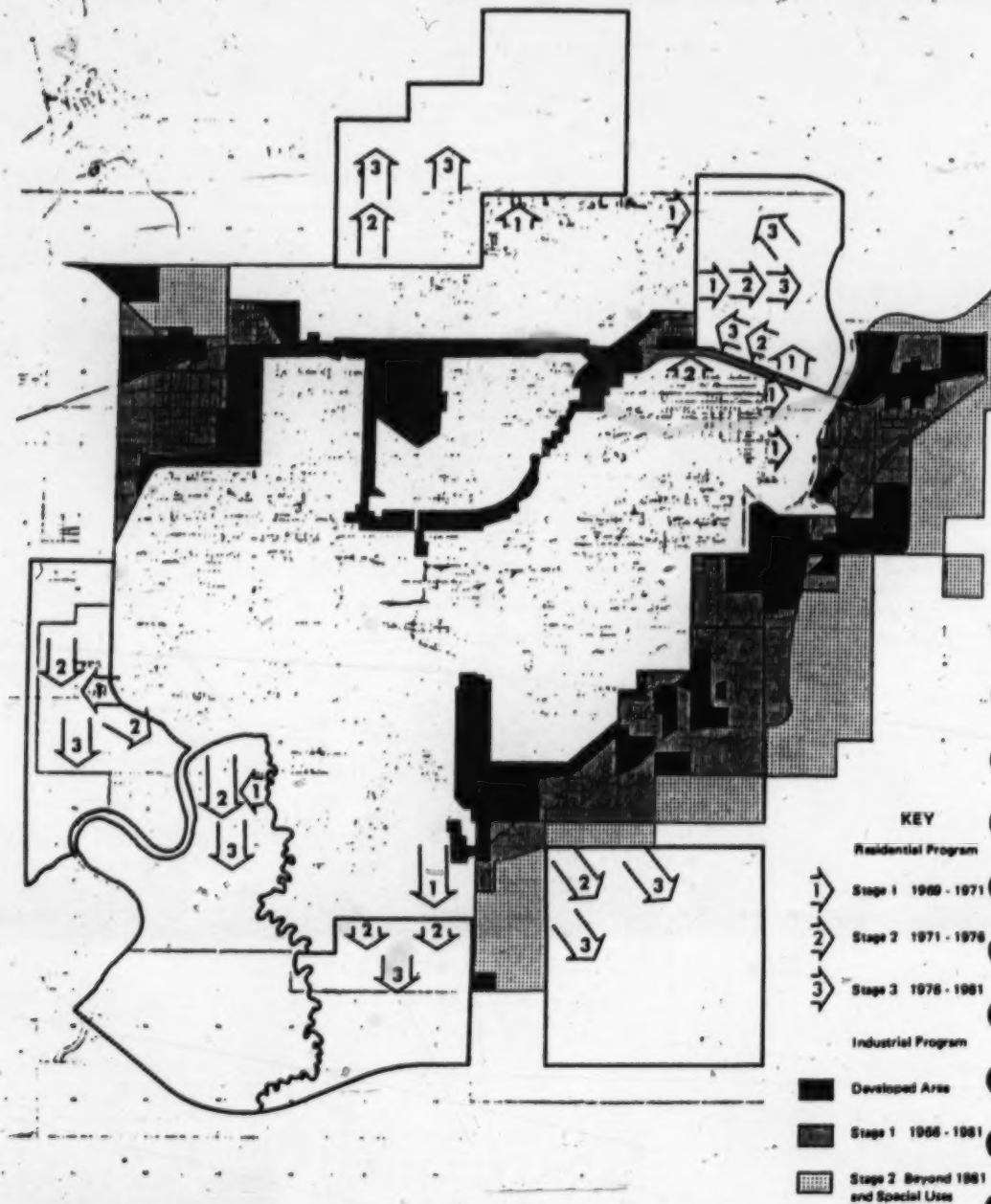
EDMONTON GENERAL PLAN
CITY POPULATION 1881 - 2001
POPULATION AND EMPLOYMENT

DWG.
2
CHAPTER III

Source: The City of Edmonton General Plan, August 1967, p.3.5

FIGURE 2

Staging Residential Development in the City of Edmonton 1969-1981



EDMONTON GENERAL PLAN
STAGING PLAN
PROGRAMMING

DWG.
1
CHAPTER XIV

Source: The City of Edmonton General Plan, August 1967, p.14.2

Table I
Shifts in Values

	FROM	TO
The Individual	endurance of distress puritanism conformity materialism self-control achievement competition narrow interest	capacity for joy sensualism individualism humanism self-expression self-actualization co-operation wide range of interest
Society	authoritarianism independence tradition oriented education to earn a 'living work orientation parochialism	participation - involvement inter-dependence future oriented - experimentation education for living leisure orientation global village concept
Organizations	mechanistic forms competitive relations separate objectives own resources regarded as owned exclusively	organic forms collaborative relations linked objectives own resources regarded also as society's
Strategies	responsive to crisis specific measures requiring consent short planning horizon standardized administration separate services	anticipative of crisis comprehensive measures requiring participation long planning horizon innovative administration co-ordinated services

Source: Leisure Consultants, The Design of a Pilot Project for Human Development in the City of Edmonton, Volume 1, September 1970, p.5

THE UNIVERSITY OF ALBERTA

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The undersigned certify that they have read, and recommend to the Faculty of Graduate Studies and Research for acceptance, a thesis entitled Interorganizational Relations between Municipal and School Authorities Sharing Educational and Recreational Facilities submitted by Avi Habinski in partial fulfilment of the requirements for the degree of Doctor of Philosophy in Educational Administration.

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ABSTRACT

The purpose of this study is to provide a review of historical developments associated with the Joint Use Agreement among organizations providing educational and recreational services within the City of Edmonton and to analyze the problems associated with the agreement using concepts from interorganizational theory.

The investigation was guided by a conceptual framework consisting of a metasystem and an external environment. The metasystem in this study is comprised of the three focal organizations - the City of Edmonton, the Edmonton Public School District and the Edmonton Roman Catholic Separate School District - as well as of groups and individuals within the City dedicated to the metasystem goal of enhancing the community use of public facilities. The methodological framework chosen is that of a qualitative case study (Bogdan and Biklen, 1982) which focuses on the ten-year period between 1970 and 1980. The period under study was characterized by changing societal values which were reflected in the desire to decentralize decision-making and incorporate local needs in the provision of social and recreational services.

The case study investigation describes and explains three conflicts within the metasystem that were associated with the Joint Use Agreement: (a) disagreement over the consumption of alcohol on school board property; (b) implementation of a community school concept; and (c) acquisition, ownership and disposition of land. In all three instances, the School Boards jealously protected and defended the interests they had

been elected to serve - the education of children - as well as attempting to maintain control over their existing responsibilities.

The study revealed that the metasystem did not operate in isolation, and both the general and the task environments were important factors in understanding the organizational behaviour within the metasystem. Forces from the metasystem and the external environment threatened to erode the authority of the two school boards. However, they were able to withstand this outside pressure. The Provincial Governments reluctance to delegate legislative powers to local groups and mandate the community school concept aided the boards in this effort.

The analysis indicated that the metasystem was clearly a joint venture rather than a partnership or collectivity, with the metasystem goals being secondary to the goals of each individual organization.

ACKNOWLEDGEMENTS

A number of individuals contributed to the successful completion of this dissertation. I wish to express my deep appreciation to Dr. E.W. Ratsoy, the chairman of the supervisory committee, for his scholarly thoughts, creative insights and continuing inspiration, guidance and support throughout the course of the study.

Special thanks are extended to the members of the committee, Dean R.G. Glassford, Dr. C.S. Bumbarger, Dr. D.M. Richards and Dr. J.E. Seger, for their valuable suggestions, considered comments and challenging questions, and to Dr. C.G. Miskel for serving as the external examiner.

The three organizations which made their documents and records available for the study - the Edmonton Public School District, the Edmonton Roman Catholic Separate School District and the City of Edmonton - deserve special recognition. I wish to acknowledge the contribution of former and present administrators and elected officials, without whose co-operation this study would not have been possible. Special thanks is extended to Faye Hartmetz for her valuable assistance in the preparatory drafts of the thesis and to Grace Boehmer, who typed the manuscript in a highly competent manner.

Finally, sincere appreciation is extended to my wife Sara and my children Allon and Liat for their continued support, encouragement, patience and love. Their sacrifice made the completion of this study possible. A word of recognition to my parents Lola and David is also appropriate. It was they who instilled in me an appreciation for the value of education, even though their own educational opportunities were interrupted by the Second World War.

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CHAPTER 1

INTRODUCTION

Background of the Study

In 1966, an agreement was signed between the City of Edmonton, the Edmonton School District No. 7 and the Edmonton Roman Catholic Separate School District No. 7 for the use of the City's and the school jurisdictions' facilities for educational and recreational activities. Two main points in the agreement were that (a) the City would design, construct and maintain parks and recreation sites, buildings and facilities and make them available to schools free of charge, and that (b) the school jurisdictions would make school buildings and facilities available to the City and its sponsored groups free of charge. The agreement included elements of land acquisition and ownership as well as the establishment of a "Joint Planning Committee." This body, consisting of two administrators from each organization, was supposed to implement the terms of the agreement, recommend policies and develop regulations with regard to the use of the facilities.

Despite the existence of a co-ordinating mechanism, significant difficulties have been experienced with the implementation of the agreement. Over the years, various parties have called for review, renegotiation and amendment of the Joint Use Agreement. A sense of dissatisfaction and even distrust among the parties is illustrated in a comment made by a public school trustee in a public meeting in 1972:

The City is responsible for providing land for community league facilities. At the same time, the community league is responsible for paying the operational costs of these facilities. At present the School Board is paying all costs for heat, light, maintenance, etc., and yet certain City Aldermen are interfering in School Board business. The Parks and Recreation Department has tried for years to get control of school buildings through 'the back door' but school property is held in trust by the elected School Board. (Edmonton Public School Board, Minutes, September 26, 1972, p.10)

The tension among the parties continued in the 1970's during a period in which the issues of community schools and the consumption of alcohol on school premises were debated. (The latter was resolved following a plebiscite in 1974.) Furthermore, concerns regarding the operation of the Joint Use Agreement were expressed by the Parks and Recreation Department in a position paper submitted to the City Commissioner of Public Affairs in 1972. Following this report, a Joint Use Agreement Review Committee consisting of two elected representatives from each of the parties involved was formed in order to address the concerns. In 1980, after considerable negotiation over the issue of land ownership and a period during which the Joint Planning Committee was inactive (1976-1979), a new agreement was signed.

During the past six years, efforts have been directed towards "making the agreement work." The Joint Planning Committee has introduced objectives which are aimed at providing a framework for co-operation and interpretation of the Joint Use Agreement. One of the objectives of the agreement is to "increase the taxpayer support for the school systems and Edmonton Parks and Recreation as a result of public awareness of efficient, non-duplicated operations of facilities operated by the three parties" (Joint Use Agreement and Regulations, Edmonton Parks and Recreation, September, 1983).

Despite the efforts of the Joint Planning Committee to resolve specific issues and advertise the benefit of the agreement to the community at large, calls for renegotiation of the agreement continue to be voiced. During the formulation of the City of Edmonton Parks and Recreation Department's Five Year Management Plan in 1983, briefs were received and discussions took place in workshops regarding issues presented in the plan. The presentations on the access to school facilities by user groups under the Joint Use Agreement suggest that some members of the public believe that the Joint Use Agreement is not working well. Some of the statements made include: "Joint Use Agreement needs serious revamping", "recent reduction in the availability of school facilities", "reactivate the spirit of the Joint Use Agreement for the betterment of the taxpayer", and "cooperation ... appears to be at an all time low."

This study focuses on the period 1970 to 1980. It attempts to identify the major problems associated with the Joint Use Agreement during this period as well as analyzing the factors related to these problems, explores strategies that might have been used to resolve these problems and extrapolates these strategies to similar instances of interorganizational relations in the future.

Problem Statement

The purpose of this study is to provide a review of historical developments associated with the Joint Use Agreement among organizations providing educational and recreational services within the City of Edmonton and to analyze the problems associated with the agreement using concepts from interorganizational theory.

The major sub-problems for investigation are:

1. Why was a formal Joint Use Agreement perceived to be necessary?
2. What is the nature of the exchange relationship among the parties? Is it reciprocal?
3. What problems contributed to the renegotiation of the Joint Use Agreement?
4. What were some of the pressures originating from within the metasystem which were associated with the position of the focal organizations on the Joint Use Agreement?
5. What were some of the pressures upon the focal organizations originating from the external environment which were associated with their position on the Joint Use Agreement?
6. What changes were incorporated in the new agreement and did they address the concerns of those that demanded the review?
7. How did the Joint Planning Committee operate in addressing problem areas in the 1970's?
8. Is the interorganizational collectivity an appropriate conceptual framework for the study of the Joint Use Agreement?
9. What significant issues and themes emerge from this research that are of relevance to the analysis and understanding of interorganizational relationships generally?

Relevance of the Study

This study is justified on theoretical grounds as well as by its practical significance.

Theoretical Justification

Support for further study of interorganizational relations in order to provide empirical data and facilitate the formulation of theory has been voiced by many writers in the field (Perrow, 1979; Van de Ven, 1976; Van de Ven, Emmett and Koenig, 1974; Whetten, 1981). Scott (1981) and Aldrich (1979) suggest that, despite recent attention given to the study of the interdependence of organizations and their environment from an open systems perspective, the field is still in its infancy.

Critics of recent trends in the analysis of interorganizational relations state that research should not be limited to the identification of general patterns but should provide further insight (Zeitz, 1975; Whetten, 1981). Zeitz comments on the present state of knowledge in the field of interorganizational relations. He states that:

We really don't know very much about the actual relations between these organizations, or about the community context. We really don't know very much about the community determinants of these relationships. Further coordination would seem to have something to do with efficient and effective exchange of clients; yet we know nothing of the experience of these clients in this system... legal and funding structures have been alluded to, but we don't know much about how they affect the organization. (Zeitz, 1975, p.43)

The present study contributes to the body of empirical data in this field and provides insight into the interorganizational relations among three large human service organizations.

Finally, the studies that have generated the present body of knowledge in the field of interorganizational relations among human service organizations have focused on medical and social services. Very little is known about interaction among organizations providing educational and recreational services. This case study therefore

provides an opportunity to explore whether the findings reported in studies of other services have wider application.

Practical Significance

The effective and efficient utilization of public resources is important to the public at large, which elects representatives to City Council and the school boards and financially supports the services they provide. Therefore, one could assume that these organizations would be interested in cooperating to provide improved efficiency and effectiveness in the use of the resources available to each body. Despite this public interest, and the incentive for organizations to work together, the City of Edmonton and the two local school jurisdictions have experienced difficulties in implementing the Joint Use Agreement. This study has as its purpose to identify and clarify problem areas and to offer solutions.

The findings and recommendations derived from this study are of importance at the level of elected officials as well as that of the administration of the participating organizations. Other parties affected by the agreement and therefore standing to benefit from the study are: (a) the Joint Planning Committee, a body which serves as the coordinating mechanism and is interested in improving the image and the operation of the agreement; (b) the Federation of Community Leagues, which is involved in community development activities; (c) many groups and individuals that seek access to schools, and (d) students using recreational facilities.

The assembly of historical data on the conditions leading to the agreement and the accompanying identification of its problem areas are of

potential significance to the three organizations in relation to the training of new employees who will assume responsibilities associated with the Joint Use Agreement. All three organizations experience personnel turnover, and the availability of this study may provide new employees with the opportunity to learn about the evolution of the agreement, the difficulties experienced in its implementation and the alternative courses of action which might be taken to improve services to the community.

Finally, school jurisdictions in other urban and rural areas of the country deal with similar issues. The insights gained as a result of this study may have wider relevance in providing information useful in designing or attempting to improve the interorganizational relationships in which they participate thereby leading toward effective and efficient utilization of public resources.

Delimitations

The scope of the study was delimited as follows:

1. The boundaries of the City of Edmonton are coterminous with those of the school jurisdictions. The case study was limited to this geographical area although elements of the external environment of the metasystem under study operated beyond the city boundary.
2. In general, the study was confined to events related to the Joint Use Agreement which took place during the period 1970 to 1980. On occasion it was necessary to refer to phenomena and activities which occurred prior to or after this study period in order to gain additional insight, clarity or continuity.

3. The study focuses on the Joint Use Agreement and issues that were associated with its development and does not include the on-going implementation of the Agreement.

Assumptions

The main assumptions related to this study were:

1. Social environments contain multiple intangible realities rather than a single all-embracing truth.
2. All necessary public and organizational documents were made available for the study.
3. Accurate and adequate analysis of the environmental factors associated with the evolution of the 1980 Joint Use Agreement can be undertaken with the case-study method.

Limitations

The limitations of this study are primarily associated with its generalizability and with the sources of data used. The practical applicability of the case study may be limited considering that educational and recreational services in Edmonton, Alberta are provided under two separate Provincial Ministries and Acts. The Provincial Department of Education delegates the authority for providing educational services to school boards while the City, which provides recreational services, is subject to the provisions of the Municipal Government Act administered by the Provincial Department of Municipal Affairs. In provinces, states and countries where educational and recreational services are governed in a different manner, adjustments would have to be

made to reflect the different governance structure prior to applying any of the findings from this study.

-The sources of data and their limitations are as follows:

1. Minutes of meetings. Although these minutes were approved by the elected officials following each meeting, they were usually a summary rather than a presentation of verbatim discussion. The follow-up with interviews helped to address some of the concerns which arose from the minutes.

2. Interviews. Information from interviews was limited to those individuals who were available and willing to divulge information to the researcher. Furthermore, the quality of information was affected by the interviewee's ability to accurately recall past events. In order to ensure the accuracy of data, a triangulation methodology was used to verify the information from the interviews through comparison with information drawn from other interviews and documents.

Definitions

Many of the terms used in this study are defined at the time of their initial usage. Selected terms which are widely used in this study are defined below:

Organization	Aldrich (1979) defines an organization as a goal-directed, boundary-maintaining, activity system. Operationally, the three signatories to the agreement - the City and each of the two school boards - are considered to be organizations.
Systems theory	A theory which suggests that an organization must be studied as a whole, taking into consideration

	the interrelationships among its parts as well as relationships with its environment.
System	A unit which takes in resources, transforms them and sends them out. Such a unit depends on its external environment for survival.
Metasystem	A collection of subsystems which are working towards the achievement of individual as well as common goals. Operationally, the three parties to the agreement, interested groups (eg. Federation of Community Leagues, Edmonton Area Home and School Association) and individuals affected by the agreement (eg. evening users of school facilities) form the metasystem.
Collectivity	A social system that is able to act as a unit.
Interorganizational Collectivity	Two or more organizations that join together to attain a specific objective by performing a set or series of goal-directed actions.

Outline of Remaining Chapters

The first chapter provided an overview of the proposed study. It briefly described the background events central to the study, their purposes and significance. The delimitations, assumptions and limitations were stated and a number of terms to be used in the study were defined.

The second chapter provides a review of the literature which begins with a brief overview of developments in the study of organizational theory. It then focuses on studies addressing issues related to the

relationships between organizations and their environments and to interorganizational relations. Finally, literature related to policy decision-making which is relevant to this study is discussed.

The conceptual and methodological framework as well as the research strategies and procedures form Chapter Three of this study. The framework was developed on the basis of findings from previous studies reviewed. It draws as well upon criticisms regarding the present state of knowledge about interorganizational relationships and suggestions for enhancing such knowledge.

The fourth chapter describes the setting of the case study including population trends within the City of Edmonton and the source and nature of power delegated to the parties to the agreement. Chapter Five describes the evolution of, and perceived problems with, the 1970 agreement and analyses dimensions of this interorganizational relationship, including formalization, intensity and reciprocity of the agreement.

Chapters Six and Seven focus on pressures on focal organizations from within the metasystem and its external environment respectively. Three cases/events are analyzed in each of the two chapters in order to gain insight into variables associated with conflicts over the Joint Use Agreement during the 1970's.

The eighth and final chapter has three sections: (1) an overview of the research findings from an interorganizational perspective; (2) the practical implications of the findings, and (3) recommendations for future research.

CHAPTER 2

THE LITERATURE REVIEW

Introduction

The review of the literature is designed to facilitate the development of a conceptual framework for the study of interorganizational relations. It commences with a brief overview of developments in the field of organizational theory. The review focuses on the open systems perspective as the fundamental theoretical basis for the study of the relationship between organizations and their environments. It then examines the literature on interorganizational relations and the frameworks for interorganizational analysis.

In view of the fact that the case study involves a policy controversy, it was deemed important to review relevant policy analysis literature. This section contrasts the public official's self-interest with the individual's perception of the public interest, and further reviews literature associated with value contexts.

The literature review addresses such questions as:

1. How does organization theory view the environments of organizations?
2. What does the literature tell us about the interaction between the organization and its environment?
3. Why do organizations engage in interorganizational relations?
4. What do we know about the properties of linkages among organizations?

5. What approaches and frameworks have been used to analyze interorganizational relations?

6. What is the basis upon which policy-makers make their decisions?

Following this chapter, the conceptual and methodological framework for the study is developed, based on the findings of this review.

The Study of Organizations: A General Overview

Organizations have been analyzed from a variety of perspectives. Scott (1981) groups these perspectives into three categories in his review of the literature on organizational analysis: the rational, natural and open systems approaches. This classification will be used in the brief review of the literature on organizations which follows.

The rational system theorists have emphasized goal specificity and formalization as major elements which explain organizational action. Several approaches were identified under this perspective. The scientific management school of thought attempted to analyze individual tasks in order to derive the most efficient method of operation. Although this approach focused on workers and on the scientific determination of the work procedures, Taylor suggests that managers' activities should also be rationalized on the basis of findings from scientific experiments (Taylor, 1911). A second approach, developed concurrently with scientific management, focuses on management functions (Fayol, 1945). It attempted to derive a set of principles which would rationalize administrative activities. The two administrative activities which received the most attention were coordination and specialization. Principles were developed to address such issues as span of control, responsibilities of the administrator, line versus staff functions, rationale for grouping in an organization, and reporting relations.

Several writers reviewed the work of the "administrative theorists" and found the administrative principles to be simplistic statements on behaviour in an organization (Massie, 1965; Simon, 1957 and Scott, 1981). Scott (1981) suggests that:

. . . many of the proposed administrative principles are primarily definitional in character outlining the characteristics of a hierarchically structured formal organization, while others are sufficiently vague and imprecise as to be of little value to practitioners or researchers. (Scott, 1981, p.66)

Massie (1965) questions some of the assumptions used in forming the principles. He disagrees with the assumptions that individuals are motivated primarily by economic factors and that strictly following a defined task is preferred to the freedom of discretionary activity (Massie, 1965). Simon (1957) reviews the principles and concludes that they lack specification and consistency. In addition to its questionable assumptions, this approach failed to suggest conditions or circumstances which limit the applicability of the principles, nor did it identify the specific situations or characteristics of an organization to which the principle(s) could be applied.

Weber's theory of bureaucracy can also be placed among the approaches which perceive organizations as rational systems. Weber (1947) contrasted and compared different cultures and historical periods to suggest that, during the last few centuries, rational bureaucratic forms have been supplementing traditional administrative systems. Weber discusses characteristics of bureaucratic organizations which include division of labor, hierarchy of positions, and rules governing performance and selection of personnel. Weber's formulations have been criticized for being conceptual schemes and a set of hypotheses rather than a theory (Blau and Scott, 1962). Udy (1959) suggests that the

structural variables identified by Weber should not be considered as a matter of definition but rather be tested empirically.

Simon (1957) is critical of the assumptions used by early theorists and suggests that the "economic man" motivated by financial rewards and seeking an optimal solution after examining all other options be replaced with a more human "administrative man" who is willing to settle for a satisfying solution and is aware of only a few possible alternative courses of action in any situation. Simon's theory of administrative behaviour focuses on decisions made by an individual in his role as a participant in the organizational context. He differentiates between decisions made by individuals at different levels in the organization's hierarchy. Individuals at the lower level address questions on how the organization can best carry out a specific task while decisions by those at the higher level focus on what the organization is going to do (Simon, 1957).

The two key elements of the rational system perspective - goal specificity and formalization - are incorporated into the "bounded rationality" concept proposed by March and Simon (1958). The concept includes a set of organizational constraints within which an individual is expected to make a decision.

In summary, the rational system perspective views the structural arrangements within organizations as tools deliberately designed for the efficient achievement of goals. The rational system theorists focus on the normative structure of organizations and ignore the effect of the larger social, cultural and technological context on the structure of the organization.

While the rational system perspective places emphasis on the structure of the organization, little attention is given to the

characteristics of the participants. The "Human Relations" movement, considered by Scott (1981) as an approach in the natural systems perspective, was developed following a study at the Hawthorne plant of the Western Electric Company during the late 1920's and the early 1930's (Mayo, 1945). The study highlights the discrepancy between how the organizational system was supposed to work and how workers actually behaved. Furthermore, it demonstrated the impact which informal group attitudes could have on output and productivity. Following this study, the human relations school has grown to encompass a wider interest in organizational participants, including the individual, small group behaviour and intergroup behaviour. One of the criticisms of this approach is that it focuses primarily on the organization's internal arrangements. This criticism does not apply to all work related to the natural systems perspective. Selznick's (1948) institutional model and Parsons' (1960) social system model do consider the environment as a factor affecting the organization.

Selznick (1948) developed a natural system model which is known as the institutional approach. He differentiates between those organizations which are rational, means-oriented, and in which efficiency guides the process of administration, and those in which the participants identify with and become part of the organization. The process of institutionalization is viewed as one of organic growth in which the organization adapts to reflect the interests of internal groups and the values of the external environment. Perrow (1979) suggests that the contribution of the institutional school is in the notion that (a) various types of organizations exist; (b) organizations develop an inner logic and direction of their own, and (c) external environments exist which impact on the organization. Scott (1981) recognizes Selznick's

consideration of the environment, but suggests that the view of the environment is highly selective and that:

. . . it is primarily perceived as an enemy, as a source of pressures and problems. In most of the studies in this tradition, (institutional approach) the organization is viewed as capitulating to a tyrannical and hostile environment as the price of its survival. (Scott, 1981, p.99)

Parsons (1960) presents a framework for categorizing organizations on the basis of the type of function or goal they serve with respect to the wider society. He distinguishes four types of organizations: (a) production or economic organizations which produce goods or services consumed by society; (b) political organizations (e.g., government, military); (c) integrative organizations (e.g., courts, hospitals), and (d) pattern maintenance organizations (e.g., churches, universities). While this typology recognizes the significance of the relationship between organizations and their environments it provides little insight into the organizations themselves or the nature of their environments.

In the 1960's and 1970's, numerous studies were undertaken and models developed which challenged the assumption that organizations behave as rational systems and which suggested that the environment does not play an important role in determining the behaviour and the survival of organizations (Emery and Trist, 1960; March and Olson, 1966; Meyer and Rowan, 1977; Pfeffer and Salancik, 1978). Emery and Trist suggest that:

. . . there has been something of a tendency to continue thinking in terms of 'closed' system, that is to regard the enterprise as sufficiently independent to allow most of its problems to be analyzed with reference to its internal structure and without reference to its external environment. (Emery and Trist, 1960, p.84)

Katz and Kahn (1966) criticize the closed system approach for ignoring the environmental forces affecting the organization and argue in

favour of Scott's third perspective, the open system. They suggest that external factors are significant in the organization process:

The major misconception (of the closed system approach) is the failure to recognize fully that the organization is continually dependent upon inputs from the environment and that the inflow of materials and human energy is not a constant . . . the very efforts of the organization to maintain a constant external environment produce changes in organizational structure. (Katz and Kahn, 1966, p.26)

Furthermore, Katz and Kahn suggest that focusing on the internal structure of the organization prevents the acquisition of valuable knowledge regarding the organizational environment. They state that:

Traditional organizational theories have tended to view the human organization as a closed system. This tendency has led to a disregard of differing organizational environments and the nature of organizational dependency on environment. It has led also to an overconcentration on principles of internal organizational functioning, with consequent failure to develop and understand the processes of feedback which are essential to survival. (Katz and Kahn, 1966, p.29)

Von Bertalanffy (1956) introduces the general systems concept which is based on the premise that certain concepts are relevant across a broad spectrum of disciplines and include entities such as cells, organs, organisms, groups, organizations and societies. A system capable of self-maintenance based on transformation of resources from its environment, like a living cell, is considered an open system. Buckley (1967) notes that transformation of resources is essential for the system's viability. From an open system perspective, the conditions of the environment and the characteristics of the systems within it are closely related. Characteristics which define open systems include: importation of energy and information from the external environment, transformation of energy, exportation of product to the environment, cyclical energy exchange, negative entropy, differentiation (greater

specialization of functions) and equifinality (more than one way to produce a given outcome).

Organizations are perceived as open systems which have unique properties of their own but they share other properties in common with all open systems (Meyer, M.W., 1978). Although significant attention has been given to the development of approaches to open systems and the interdependence of organizations and their environments, Scott (1981) and Aldrich (1979) suggest that the field is still in its infancy.

Organizational Environment

The significance of its environment to an organization has been expressed in numerous publications on organization-environment relations (Aldrich, 1979; Dill, 1958; Emery and Trist, 1965 and Terreberry, 1968), interorganizational interaction (Levine and White, 1961; Litwak and Hylton, 1962; Guetzkow, 1966; Marrett, 1971 and Benson, 1975) and in formulations of the contingency theory in the 1960's (Lawrence and Lorsch, 1967; Thompson, 1967).

One of the concerns in the study of organizational environment is its conceptualization (Perrow, 1979). Many studies attempt to delineate the role of organizational environment and to classify its elements (Hall, 1977; Aldrich, 1979 and Hasenfeld, 1983). It has become clear that organizations do not operate in isolation and that environment is a critical factor in understanding organizational behaviour.

Hall (1977) distinguishes general environment from task environment. General environment includes the following conditions affecting all organizations: technical, legal, political, economic, demographic, ecological and cultural (see also Aldrich, 1979). Hasenfeld suggests that the general environment must be considered as a given factor in all

organizational matters because "except in rare instances, no single organization can significantly alter these general environmental attributes" (1983, p.51). The ability to exploit the environment in the process of securing scarce and valued resources is proposed by Seashore and Yuchtman (1967) as a measure of organizational effectiveness.

The general environment not only affects an organization directly, it also influences the characteristics of the task environment. The latter was defined by Thompson as "those parts of the environment which are relevant or potentially relevant to goal attainment" (1967, p.27). Dill (1958) had used the term "task environment" to refer to elements in the environment which are relevant or potentially relevant for the organization. Aldrich (1979) specifies the nature of the task environment using the term "specific environment". It includes other organizations and individuals with whom the focal organization interacts. Aldrich suggests that "in the case of specific environmental factors, the interaction is direct, whereas the general environment is not a concrete entity in interaction, but rather comprises conditions that must be grappled with" (Aldrich, 1979, pp.303-304). He also suggests that the environment is dynamic and that the significance of the different factors (environmental conditions) varies with time (Aldrich, 1979).

Child (1972) proposes three dimensions for empirically measuring the task environment: variability, complexity and threat. A more detailed discussion on dimensions used to study organizational environments is presented in the section on interorganizational analysis.

The nature of the interaction between the organization and its environment has been the focus of numerous studies. Emery and Trist (1965) and Terreberry (1968) describe the nature of organizational environment in terms of the degree of turbulence. Emery and Trist (1965)

categorize organizational environments in terms of: (a) the predictability of the environment; (b) the competition between the environment and the focal organization for resources, and (c) the rate of change in the general environment. They argue that processes in the environment affect the organization and its environmental relations and propose a typology consisting of four types of causal textures. Two types are static: the "placid, randomized" and the "placid, clustered" environments, and two are considered to be dynamic: the "disturbed reactive" and the "turbulent field."

The "placid, randomized" environment is the simplest type of environmental texture in which elements are relatively unchanging in themselves and are randomly distributed. Organizations within this type of environment can exist as relatively simple and usually small units, adapting easily to the limited environmental change they may encounter. The second type, "placid clustered", is a static but more complex environment. It is characterized by clustered or interconnected elements. Organizations within this type of environment are somewhat larger than those within the "placid, randomized" environment and tend to consist of a number of units centrally controlled and co-ordinated.

The two types of dynamic environments are the "disturbed, reactive" and the "turbulent field." The "disturbed, reactive" environment contains clustered elements in which there is more than one system of similar nature and function. As a result, organizations are required to meet competitive challenges and develop strategies in order to remain in operation. This type of environment necessitates some form of decentralization to the level where the operation is taking place. The fourth type, the "turbulent field" environment, is characterized by dynamic conditions generated "not simply from the interaction of

identifiable component systems but from the field itself (the 'ground')" (Emery and Trist, 1965, p.31). The turbulence resulting from the multiple character of the causal interconnections increases the level of uncertainty for the focal organization. Organizations find it difficult to adapt successfully through direct interaction and have to resort to more complex interconnection mechanisms in order to survive.

Terreberry (1968) views these states of the environment as part of an evolutionary continuum to which organizations, using various managerial styles, must adapt in order to survive. She observes that:

. . . systems are increasingly finding themselves in environments where the complexity and rapidity of change in external interconnectedness . . . gives rise to increasingly unpredictable change in their transactional interdependencies . . . This seems to be good evidence for the emergence of turbulence in the environments of many formal organizations. (Terreberry, 1968, p.598)

Terreberry advances the hypothesis that organizational change is largely externally induced and that system (organizational) adaptability is a function of the ability to learn and to perform according to changing environmental contingencies.

Evan (1966) adapts the role-set concept of an individual within an organization to the relationships between an organization and its environment. He introduces the term "organizational sets" referring to a network of organizations which interact with a focal organization in the form of providing resource input such as capital and personnel or acquiring output in the form of goods and services. Aldrich (1979) discusses the concept of "organizational set" and suggests that organizations use other organizations of the same type both for comparison purposes and as a source of new ideas.

Thompson (1967) uses the term "task environment" to refer to the set of external groups and organizations which control access to potential

and actual resources for the focal organization. In a recent publication, Hasenfeld (1983) expanded the task environment concept, extending it beyond the resources of the organization. Referring to human service organizations, he includes the following organizational needs as part of the task environment: fiscal resources, legitimation and authority, clients, complimentary services, consumers and recipients of the organization's products and competing organizations. Any specific organization or group in the task environment may represent one or more of these organizational needs. Identification of the task environment helps in defining the domain of the organization. Thompson (1967) suggests that:

. . . the organization's domain identifies the points at which the organization is dependent on input from the environment. The composition of that environment, the location within it of capacities, in turn, determines upon whom the organization is dependent. (Thompson, 1967, pp.26-27)

Achieving domain consensus is dependent upon several dimensions (Aldrich, 1972; Hasenfeld, 1983):

- | | |
|----------------------------------|---|
| 1. Stability or instability: | The degree of turnover of elements in the environment |
| 2. Homogeneity or heterogeneity: | How different are the elements in the task environment? |
| 3. Concentration or dispersion: | How are the resources distributed among the elements? |
| 4. Richness or paucity: | How many resources in the environment could be available to the organization? |
| 5. Turbulence or placidness: | To what extent is the environment changing? |

Hasenfeld (1983) uses two hypothetical cases to illustrate the impact of these variables on the domain consensus and the survival of the organization:

Environmental turbulence coupled with paucity of resources is also a barrier to forming domain consensus because it is likely to produce more turnover in the elements of the task environment and fierce competition for the limited resources. In contrast, when the environment is rich, resources are more dispersed, and the environment is heterogeneous, it is then easier to achieve domain consensus because the environment will support and tolerate different organizational forms. (Hasenfeld, 1983, p.66)

A major environmental factor which organizations must take into consideration is other organizations, in particular those which are part of their task environments.

Interorganizational Relations

Numerous studies emphasize the significance of interorganizational relations in the study of organizations and their environments. Some of them focus on business and financial organizations, many of which are linked by interlocking directorates (Pfeffer, 1972; Palmer, 1983) while others examine human service organizations, in which clients are often referred to or passed on from one organization to another (Levine and White, 1961; Litwak and Hylton, 1962; Aiken and Hage, 1968; Hasenfeld and English, 1974). Hasenfeld and English state that:

It is useful to study interorganizational relationships in order to understand the conditions that lead to the emergence of relationships between organizations to become sensitive to consequences of these relationships on interorganizational structure, processes, and clientele, and to become aware of the forms of linkages which effectively join organizations to each other. (Hasenfeld and English, 1974, p.540)

Ratsoy (1980) reviews the findings of several studies on interorganizational relations and suggests that the nature of the linkages between systems relates to measures of organizational effectiveness or policy implementation effectiveness. Understanding the nature of the various types of relations and the conditions in which they are most effective is expected to assist not only in the development of

interorganizational theory but also in helping practitioners in the design of organizations and their environmental interaction patterns. It may also help to explain the extent to which organizational characteristics are influenced or determined by the interorganizational relationships in which the organizations in question are involved, or conversely, the extent to which the nature of interorganizational relationships are affected by the characteristics of the organizations themselves.

Levine and White (1961) attempt to explain relationships among community health and welfare agencies using an exchange system as a conceptual framework. Exchange theory has been the dominant theoretical perspective in the investigation of interorganizational relationships (Hall, Clark, Giodano, Johnson and Van Roebel, 1977; Van De Ven, 1976; Ratsoy, 1980). Exchange was defined by Levine and White as ". . . voluntary activity between two organizations which has consequences, actual or anticipated, for the realization of their respective goals or objectives" (Levine and White, p.588). They suggest that organizations have needs for clients, labour services and other resources, and that, under conditions of scarcity, interorganizational exchanges are essential to goal attainment. These exchanges include resources and functions which are required to sustain the organization. Hasenfeld (1983) proposes that interorganizational relations comprise a form of organizational action adopted to secure resources, reduce uncertainty and gain some mastery over the environment (Hasenfeld, 1983).

Jackson and Morgan (1978) view the significance of the relationships with the environment in terms of reduction in the level of uncertainty. They suggest that:

. . . as organizational environments evolve, they become more turbulent and therefore, less certain. Then as organizations begin to feel pressure both internally and externally, they develop interorganizational relationships or ties with other organizations in the environment to reduce this uncertainty. (Jackson and Morgan, 1978, p.243)

Attainment of goals that are unachievable by organizations functioning independently is a major reason for the development of interorganizational relationships (Ratsoy, 1980; Van De Ven, 1976; Levin and White, 1961). Aiken and Hage (1968) elaborate on the voluntary nature of the exchange. In their view, organizations are pushed into interdependencies such as developing joint, cooperative activities because they need resources such as money, specialized skills and access to market. In general, organizations attempt to maintain their autonomy, which means that they are free to choose their course of action. By engaging in some form of relationship with organizations in their environment, organizations in many cases lose some of the freedom to act independently. Van de Ven (1976) suggests that an organization prefers not to become involved in such relationships unless it is compelled to do so since the allocation of resources to the development and maintenance of such relationships restricts the ability to expend those resources in the pursuit of other objectives, thus restricting the organization's autonomy.

While Levin and White (1961), Benson (1975) and other exchange theorists recognize only the voluntary nature of the interaction, Aldrich (1976) and Turk (1970) examine mandated forms of organizational interdependence, such as those required by legislation or governmental regulations. Mandated relations were found to determine the pattern of organizational interaction, the flow of resources and the organization's domain itself. Aldrich (1976) suggests that mandated relations tended to

form an imbalanced interaction, were more intense and were associated with a perception of a lower level of cooperation. Hall, Clark, Gordano and Van Roekel (1977) stress the significance of careful determination of the basis of the relationships and suggest that one cannot rely exclusively on exchange theory in the study of interorganizational relationships since a large number of the interactions are mandated or are based on formal agreements. They propose a third form of interaction, one which is voluntary but standardized through formal agreement.

Rees (1983) reviews the literature on interorganizational theory and generalizes that "interdependent organizations are understood to be either similar or dissimilar organizations interacting either by mandate some standardization, or voluntarily because of some mutual, although not necessarily equal, need to attain either self-interest or collective goals" (Rees, 1983, p.51).

Interorganizational Analysis

Studies on interorganizational relations can be divided into two major approaches (Rees, 1983). The first approach addresses organization-environment relations, using the interaction between a focal organization and other organizations in the task environment as the focus of study (Aiken and Hage, 1968; Evan, 1966; Levine and White, 1961; and Dill, 1958). The second approach investigates the comparative and relational properties of the interacting organizations (Marrett, 1971; Aldrich, 1979).

An important element in the study of the focal organization and its organization-set is the boundary-spanning function of the focal organization.

Organizations are boundary-maintaining systems of human interaction which set conditions for entry and exit of individuals as well as determine conditions under which members enter roles associated with organizational action. Dependence on other organizations and existence of free choice of entry and exit limits the autonomy of the formal organization. As a result, authorities attempt to preserve the integrity of an organization's boundaries and the stability of its structure by controlling entry and exit (Aldrich 1979). In cases of conflicts with the organizational environment, the focal organization applies two main strategies: strengthening the requirements of participation (require conformity to organizational rules and ideology) and expanding organizational boundaries (acquire persons from competing groups). Etzioni (1961) discusses the strategy of expanding the organizational boundary and suggests that, during a conflict, members of the challenging groups may be absorbed, co-opted or amalgamated into the focal organization.

Boundary-spanning roles link organizations to their environments and fulfill two functions: information processing and/or external representation (Aldrich, 1979). The information channelled to the organization by boundary spanners could be significant. There are some indications that innovations and structural change in an organization result from information brought in by boundary-spanning personnel (Hage and Aiken, 1970). External representation functions include resource acquisition and disposal, maintaining or improving political legitimacy of an organization, and enhancing its "image" and social legitimacy. The extent and type of involvement in boundary-spanning activities varies among organizations. Some organizations establish specific positions for boundary-spanning functions while other organizations expect these

functions to be part of the responsibilities of numerous individuals. Boundary-spanning roles are expected to proliferate when organizations are in concentrated, heterogeneous, unstable and lean environments.

Aldrich (1979) examines the issues associated with spanning organizational boundaries and suggests that there is limited knowledge about boundary-spanning roles because of paucity of research on how boundary spanners actually go about their duties. Starbuck (1973) argues that establishing an organizational boundary is a complex issue since organizations have different shapes and boundaries, depending upon which components are observed and who is observing. He concludes that the boundaries are created arbitrarily depending on the observer's frame of reference.

The approach which deals with a focal organization and its interaction with other organizations in the task environment is applied in studies of strategic management (Schendal and Hofer, 1979; Paulson, 1977). Paulson's (1977) analysis typifies this approach. He discusses alternative strategies that may be available to focal organizations under different conditions and suggests a cyclical process which includes: the development of relations with other organizations in order to enhance the achievement of organizational goals, internal adjustment to fit the change in the environment, and the development of other relationships to address difficulties with the former relations or changing circumstances.

In recent years, researchers have expressed the need to expand the scope of study and include the examination of all interactions within the task environment (Aldrich, 1979; Aldrich and Whetton, 1981). Aldrich (1979) argues that transactions between pairs of organizations provide little information about the environment of the organizations. He

identifies three levels of interorganizational analysis which are distinguished by the boundaries placed on the scope of study:

1. Organizational set. It consists of the organizations with which a focal organization has direct links.

2. Action sets. The concept includes a group of organizations formed into a temporary alliance for a limited purpose.

3. Network. An interorganizational network consists of all organizations linked by a specified type of relationship, and is constructed by finding the ties between all organizations in the populations.

In support of the network approach, Aldrich (1979) suggests that the network analysis could be applied in the study of diffusion of innovations, may create the conditions under which organizational and action sets arise, and could help clarify concepts of interorganizational environments.

Studies which address the comparative and relational properties of organizations, environments and interacting mechanisms are of significance to the different levels of aggregation proposed by Aldrich. A review of the dimensions of the interaction would provide an insight into the nature of the interorganizational relations.

Comparative Properties

Researchers have developed a number of dimensions to compare the properties of organizations which are part of an interaction network (Aldrich, 1979; Marrett, 1971; Van de Ven, Emmett and Koenig, 1974). The comparative properties include:

1. Homogeneity. The degree of similarity or differentiation between the elements of the population dealt with including

organizations, individuals and any social forces affecting resources (Aldrich, 1979). Thompson (1967) suggests that a homogeneous environment may lead to standardization and undifferentiated products and services. Some of the variables used to determine level of homogeneity are centralization, internal communication and organizational complexity.

2. Domain Consensus. The degree to which domain consensus exists among the various organizations (Levine and White, 1961), the compatibility of organizational goals and philosophies, and the amount of goal overlap (Evan, 1966).

3. Environmental Stability. The degree of turnover in the elements of the environment (Aldrich, 1979) or in the organizations existing within the network (Thompson, 1967). A stable environment may mean that organizations will be able to develop a consistent approach to deal with the environment.

4. Awareness of other parties. The degree of knowledge of the goals, services and resources of other parties in the network (Litwak and Hylton, 1962; Van de Ven, Ememtt and Koenig, 1974).

5. Environmental Turbulence. The extent to which environments are being disturbed by increasing environmental interconnection (Emery and Trist, 1965; Terreberry, 1968).

6. Size of Network. The number of organizations interacting in the network (Evan, 1966; Litwak and Hylton; Whetten and Aldrich, 1979).

7. Resource Dependence. The amount and type of resources held and needed by each party (Evan, 1966; Aiken and Hage, 1968), and the number of alternative sources for required resources (Levine and White, 1961; Litwak and Hylton, 1962; Evan, 1966).

8. Overlap in Membership. The number of participants who represent more than one organization in the network (Allen, 1974; Palmer, 1983).

Relational Properties

The literature on relational properties of interacting organizations can be divided into two main approaches. The first focuses on the dimensions of interorganizational linkages while the second approach analyzes the mechanisms for coordination between organizations.

1. Dimensions of Interorganizational Linkages

Several dimensions have been suggested for the study of the linkages between and among organizations. The dimensions of exchange identified in Levin and White's (1961) study of health and welfare agencies include: parties to the exchange, kinds and quantities exchanged, the agreement underlying the exchange, and the direction of the exchange which includes unilateral, reciprocal or joint flow of organizational elements. Hall (1977) describes the nature of the interorganizational linkages using three variables: frequency of interaction, formalization of relationships, and the cooperative or conflictual nature of the relationship. Marrett drew from studies by Evan (1966), Levine and White (1961), Warren (1967), Guetzkow (1966) and others to derive a conceptual framework which could assist in the analysis of linkages among organizations. She proposes four dimensions: the degree of formalization, intensity, reciprocity and standardization. Mutema (1981) applies these dimensions to describe the interorganizational linkages between a medical training centre and eight provincial hospitals in Kenya. Andrews (1978) studies the patterns of interorganizational linkages in a joint cooperative program in the allied health area of respiratory technology. He applies the first three dimensions suggested in Marrett's study and incorporates the standardization dimension as one of the indications of formalization. The four linkage dimensions

proposed by Marrett are reviewed below in terms of their meaning and some relevant research findings and observations.

(a) Formalization. The concept of formalization refers to the extent to which there is a formal agreement or official sanctions adopted by the organizations involved in the interaction. The degree of formalization may vary from a legal contract to informal relations. It seems that in social welfare settings and other human service organizations, informal, tacit, arrangements occur quite frequently among organizations while formal agreements are less common (Marrett, 1971). Formal agreements usually require a greater commitment on the part of the parties involved. Guetzkow (1966) examines the formal and informal relationships among organizations and hypothesizes that successful informal interactions are likely to lead to a more formal agreement. Hall, Clark, Giordano, Johnson and Van Rooke, (1977) emphasize the importance of identifying the basis for the interorganizational relationships and suggest that differences in the linkages may reflect the nature of the interaction (formal or informal). A formal agreement may also have an impact on the organization itself. Aiken and Hage (1968) found that formal agreements reduce organizational innovation while Guetzkow (1966) suggests that they reduce organizational autonomy. On the other hand, a long-term contract or a merger may reduce uncertainty in the organizational environment and increase the level of stability in the organization (Pfeffer, 1972b).

Coordination is a variable considered under the formalization dimension. Coordinating mechanisms have been developed in the private as well as the public sector. A coordinating agency is proposed by Litwak and Hylton (1962) for the purpose of reducing conflicts in a highly formalized interaction. Such an agency could achieve its goals by

communicating pertinent information, adjudicating areas of dispute, providing standards of behaviour and promoting areas of common interest. Litwak and Hylton's (1962) study provides some support to the hypothesis that coordinating agencies will develop and continue to exist if formal organizations are partly interdependent, if they are aware of this interdependence, and if the coordinating agency can develop standardized units of behaviour for the organizations whose activities it is coordinating. The latter concept was used by Andrews (1978) as the third indicator of formalization in his study of interorganizational relationships in programs for the preparation of allied health professionals.

(b) Degree of Intensity. The concept of intensity refers to the extent of involvement by the agencies engaged in interorganizational relations. Marrett (1971) distinguishes between two indicators of intensity: (1) the amount of resource commitment, and (2) the frequency of interaction. It is easier to study and document the extent of resource involvement in the private sector since monetary values can be used as an indicator of the provision of goods and services. In human services organizations, however, other measures have to be employed in order to provide a common indicator for purposes of comparison, such as the number of referrals, the range of services, the provision of staff to support related activities, and the frequency of interaction.

Aldrich (1979) suggests that formalization of relations between agencies leads to more frequent interaction, and more frequent interaction is likely to further efforts towards formalizing relations. The intensity of interaction is related to the level of standardization. The larger the investment, the more likely the organization will demand a

standardized mode of interaction in order to guard the committed resources (Litwak and Hylton, 1962).

(c) Reciprocity. This dimension refers to the extent to which a symmetrical interaction between the studied organizations is taking place. Marrett (1971) lists three characteristics of reciprocity drawn from Levine and White's observations. She suggests that there is a mutual flow of elements, the conditions of the exchange are mutually agreed upon, and the organizations do not have to interact on equal terms. Guetzkow (1966) provides some support to the third characteristic noting that, in reality, organizations do not have equal influence in determining the conditions of their interaction. Where interorganizational interaction is characterized by a lack of reciprocity, the organization controlling the resources is in a position of power over the organization depending on the same resources for achieving its goal or objective (Benson, 1976; Pfeffer and Salancik, 1978). Aldrich (1979) views reciprocity in a similar way. He uses two measures: (1) the extent to which resources in the transaction flow to both parties equally (or benefit one unilaterally, and (2) the extent to which the terms of the transaction are mutually agreed upon. He argues that assessment of reciprocity in the public sector is more complex than such determination in the private sector. Social service organizations, for example, are not free to set terms and conditions for their interaction with other organizations because they are required to follow regulatory and legislative guidelines. Furthermore, as indicated above, it is easier to measure the exchange, and therefore the reciprocity, when the indicator used is limited to the monetary value.

(d) Standardization. Standardization is the fourth dimension presented by Marrett (1971). It refers to the determination of the unit

of exchange and the repetition of the exchange. High levels of standardization are more likely to occur when the relations are formally recognized than when they are based on informal interaction (Marrett, 1971; Litwak and Hylton, 1961). Aldrich (1979) suggests that this dimension was extracted from models of bureaucratic structure of organizations and that:

. . . standardization of external relations is sought by cost-conscious administrators and rewarded by selection parameters favouring low transaction costs per unit of work. (Aldrich, 1979, p.277)

Two indicators of standardization have been used: the fixedness or similarity of the units of exchange and that of the procedures used in the transactions with other organizations. Andrews (1978) and Hall (1982) apply the degree of fixedness of rules and procedures as an indicator of formalization, rather than using it as a separate dimension.

The discussion so far has addressed each dimension of the linkages separately. Examination of the relationships among the different variables suggests that some dimensions may be more closely related than others. Marrett (1971) proposes two possible models which describe interorganizational linkages. The first model is characterized by a low degree of formalization, intensity, reciprocity and standardization and may be applicable to the interaction among social welfare organizations. The second model is characterized by high levels of formalization, intensity, reciprocity and standardization and describes interaction in joint programs. Marrett (1971) suggests that while the first model is a common one, the second model does not occur frequently since organizations are reluctant to invest and make the commitment that such a model requires.

The literature on relational properties of interacting organizations addresses not only the dimensions of the interorganizational linkages but examines the mechanisms for coordination between organizations.

2. Coordinating Mechanisms

Coordinating mechanisms are usually established to order behaviour between two or more organizations. Some of their tasks include communicating pertinent information, adjudicating areas of dispute, offering standards for behaviour and promoting areas of common interest. Litwak and Hylton (1962) advance the hypothesis that coordinating agencies will develop and continue to be in existence if formal organizations are partly interdependent, agencies are aware of this interdependence, and it can be defined in standardized units of action (Litwak and Hylton, 1962, p.398).

White (1974) questions whether conditions of interdependence and organizational awareness are sufficient to cause organizations to join or form coordinating mechanisms. In his discussion of coordinating councils (community decision-making organizations), White emphasizes the significance of the reason for establishing the inter-agency relations. He differentiates between concerns associated with the establishment of interorganizational relations such as the formation of networks, legitimacy and knowledge, and the considerations which result in the introduction of the coordinating mechanisms.

The reason for engaging in inter-agency relations may affect the nature of the interaction. Van de Ven, Walker and Liston (1979) examine and compare patterns of coordination among clusters of organizations which are all members of a larger network of human service agencies. They grouped 17 agencies into three clusters: the resource transactions cluster, the planning and coordination cluster, and the direct service

cluster. The three were compared on a number of dimensions of interorganizational relations and different patterns of relationships were found. The planning and coordination cluster was characterized by relatively low dependence, high awareness and consensus, and low formalization of agreements and contacts. In contrast, the resource transactions cluster was reported to be characterized by a relatively high level of dependence, low awareness and consensus, and a high degree of formalized agreements and contracts.

Relations vary not only on the basis of the reason for the linkage but also in terms of the nature of the linkage (Warren, 1967). The linkages among organizations vary from tight and formal to loose and informal (Clark, 1965). Warren (1967) analyzes the context in which community decision organizations (CDO) operate and suggests that the variation in the decision process is related to the behaviour of the CDO in the interaction process. His typology consists of four types of decision contexts:

1. The unitary. Units are organized to achieve inclusive goals and the decisions are made at the top of the hierarchical structure.
2. The federative. The units have their individual goals and decision-making power, however, they are in some formal organization for achieving inclusive goals.
3. The coalition. A group of organizations with their own set of goals collaborate informally and on an ad-hoc basis to attain desired objectives.
4. The social choice. Self-oriented units in pursuit of their goals come together of their own choice to accomplish some objectives.

These four types of decision contexts form a progression from units which are integrated within an organization in which decision-making is

centralized to units which are related to each other by choice without centralized authority.

In summarizing the review of the literature that views the environment as a collection of interacting organizations, Van De Ven, Emmett and Koenig suggest that, "Empirically, considerably more research is required before one can discuss the relationships between the comparative and relational properties in greater detail" (Van de Ven, Emmett and Koenig, 1974, p.118).

The review of the literature clearly suggests that the analysis of interorganizational relationships requires examination of the organizations involved, the network and the external environment. The focal organization is embedded within the interorganizational network and the latter is located within a larger environment. Using this concept, several studies have viewed the environment as a social system and have focused on activities within the environment rather than on specific organizations (Rees, 1983; Van de Ven, Emmett and Koenig, 1974; Warren, 1967). Warren defines the interorganizational field as the "properties of an aggregate of interacting organizations as distinguished from the properties of the individual organizations themselves" (Warren, et al., 1971, p.54). The study of subsystems within the aggregate environmental system has the potential of providing further insight into organizations and their environments.

The Interorganizational Collectivity

Another approach used to analyze interorganizational relations views the environment as a social system. Consistent with Parsons' work on social action systems, Van de Ven, Emmett and Koenig (1974) suggest that interorganizational analysis can be defined as the study of interorganizational collectivities. The collectivity is a social action system in which two or more organizations are joined together in order to attain specific objectives or identified goals. The collectivity can act as a unit and each participant can make decisions to attain the goals of the system which are binding on the collectivity as a whole. Other characteristics of the collectivity are: (a) the participants are interdependent in terms of the unit's decision; (b) it can act in a manner similar to that of an individual participant, and (c) it has to adapt to its wider environment. This means that the collectivity can act as a unit and have a unique identity separate from its members.

Reasons for organizations' desire or need to join together as an action system are identified by Litwak and Hylton (1962); and Levine, White and Paul (1963). They include: (a) to communicate pertinent information by forming a social service exchange; (b) to promote areas of common interest; (c) to gain access to a larger amount of resources, and (d) to protect areas of common interest and adjudicate areas of dispute.

As social systems, all collectivities must perform the following functions to survive (Parsons 1964): attain their goal(s), integrate the actions of the system members, adapt to the environment and ensure that the task activities, norms and values of the participants are consistent with those of the system. Van de Ven, Emmett and Koenig (1974) place the different collectivities in a continuum from the intra-organizational

collectivity at the lower level to the societal collectivity at the highest level. The interorganizational collectivity and a system consisting of a number of interorganizational collectivities are placed in between. They suggest that Warren's (1967) analysis of decision-making between interorganizational collectivities is an example of the "inter-interorganizational collectivity."

Warren (1967) outlines a field theory of interorganizational behaviour with respect to community health, welfare and social service organizations. His concept is based on the observation that the interaction between organizations is affected by the nature of the organizational pattern or the network within which they find themselves. In the specific study of community decision organizations, Warren (1967) found that decisions were being made in the most varied organizational contexts and that the difference in contexts seemed to be related to the behaviour of the community decision organizations in the interaction process.

Following Parsons' (1957) suggestion that there are three levels of hierarchical structure within the intra-organizational collectivity - the technical, managerial and institutional levels - Van de Ven, Emmett and Koenig (1974) propose that there are at least three functionally differentiated levels or subsystems within the interorganizational collectivity. The following levels are proposed for guiding the researcher in the investigation of the properties of the interorganizational collectivity:

1. Level One. This subsystem consists of the primary instrumental productive units. Research at this level focuses on member organizations of the interorganizational collectivity and compares the inputs, outputs, and instrumental activities of each member organization.

2. Level Two. The function of this subsystem is to integrate the differentiated, but interdependent, members of the interorganizational collectivity (as listed in level one).

3. Level Three. The principal functions of this subsystem are the governance of overall goals and policies and the external legitimation and support of the interorganizational collectivity domain with other social activities.

Van de Ven, Emmett and Koenig (1974) suggest that the structure and process within each interorganizational collectivity may be different and may be influenced by its unique collective objective. They propose that in analyzing the interorganizational collectivity, both structure and process be studied. In a later study, Van de Ven, Walker and Liston (1979) examine and compare patterns of relationships among clusters of agencies which are members of a Texas regional council for children and youth. They identify three tightly-connected clusters of agencies which have existed for three different reasons: resource transactions, direct services, and planning and coordination. They found that there were significantly different patterns of relations within these clusters of agencies and suggested that research should be directed towards explaining how the clusters of agencies are connected to each other.

White (1974) reviews a number of studies of intra- and interorganizational behavior in the context of a single unified framework and concludes that ". . . in view of the employment of 'open system' perspectives and with the increasing interest in organizational environments (Starbuck 1973) it seems reasonable to employ common dimensions in studying intra- and interorganizational behavior" (White, 1974, p.145).

Despite the recognition that the structure and the process dimensions are important in the study of the interorganizational field, little research has been undertaken using a process-oriented approach. Studies by Van de Ven, Walker and Liston (1979) and Van de Ven and Ferry (1980) focus on the structure of the interorganizational network and suggest that analysis of the process can provide further insights into the interorganizational relations and enable future development of a theory in this field. The significance of studying the structure and the process were highlighted in Parsons' (1957) writings regarding the general theory of social systems. He warns researchers against limiting the investigation of the interorganizational collectivity to the general pattern of interaction and suggests that the analysis should not be undertaken "without adequately clarifying the structural reference points that describe the system in which the process takes place and its situation" (Parsons, 1957, p.4).

It was indicated in the introduction to this chapter, that this case study involves policy decisions at the municipal and school board level. For this reason, a review of relevant literature addressing the basis upon which policy-makers decide a course of action was conducted and is summarized below.

Basis for Policy Decision Making

Policy decision-making has been the focus of numerous writers in the field of policy studies (Dror, 1968; Dye, 1978; Fischer, 1980; Dunn, 1981 and Weiss, 1982). Dunn (1981) uses the term "policy system" to describe the overall institutional pattern within which policies are made. The system is comprised of three elements which are interrelated: (a) policy environment, consisting of the context in which events surrounding the

policy issue take place (e.g., collective values, inflation, crime); (b) the policy stakeholders, including individuals, groups or organizations who affect or are being affected by a policy choice, and (c) the public policy. The relevant body of policies consists of past decisions regarding government direction-setting which include policies in education, social services, health and defence made by senior governments as well as policies on instruction, curriculum, business and school administration made at the level of the local school district.

One element not included in this policy system, but which is significant to the understanding of the policy-making process, is the individual policy-maker. Weiss (1982) somewhat oversimplifies the political environment by stating that policies are formulated on two bases: officials' perceptions and pressure from interest groups. However, her description of the general process used by a decision-maker in making a policy decision highlights the role of such an individual in policy decision-making. She suggests that decision-making is an event in which a group of authorized decision-makers assemble at particular times and places and go through the following stages: (a) problem review; (b) consideration of alternative courses of action; (c) review of the advantages and disadvantages of each option, which includes weighing the alternatives against goals and preferences, and (d) selection of one alternative which seems to achieve their purposes (Weiss, 1982, pp.292-293). In her concluding remarks, Weiss suggests that in some instances policy decisions are made without taking a comprehensive view and the choice is not necessarily made rationally. In such cases, "officials respond to situations by hunch and experience, drawing on whatever mix of knowledge - and of course much else besides knowledge - they have at hand" (Weiss, 1982, p.302).

The basis for decisions made by policy-makers is the focus of a book entitled Public Duties: The Moral Obligations of Government Officials, edited by Fleishman, Liebman and Moore (1981). In the book's first chapter, entitled "Serving the Public Interest", Moore raises the question of whether public officials should be acting out of self-serving or public-serving motives and highlights the obligations of the decision-maker in pursuit of the public interest. These include: (a) respect for the law, institutional relations and customers that currently structure the process; (b) obligations to friends and colleagues, and (c) obligation to oneself. Fleishman (1981) writes on self-interest and political integrity and states that ethical dilemmas in public life are more complicated than the single choice between serving oneself and serving others, since there are frequently conflicting obligations within and outside the political system. He defines integrity as ". . . having a genuine, wholehearted disposition to do the right and just things in all circumstances, and to shape one's action accordingly," (Fleishman, 1981, p.53) and argues that to have integrity in public office one must act ethically. This requires that, in each circumstance, the decision-maker must know what is right, which is exceedingly difficult under conditions of conflict between self-interest and the interests of others. Moore (1981) discusses this conflict and suggests that while officials find they owe friends and colleagues something that derives from personal loyalty and shared conceptions of the ultimate purpose:

. . . friends and colleagues cannot reasonably feel betrayed if their interests are not accommodated or their advice not taken. They can feel betrayed only if they could not have guessed at the outset what stance their friend or colleague would take. (Moore, 1981, p.27)

Although advice and claims of colleagues and friends figure quite prominently in the moral environment of a public official, they have to

be placed in perspective with the duty and the perception of the public interest held by the decision-maker. This concept is termed by Moore (1981) as the obligation to oneself. He states that:

If obligations to the public interest and to authorizing processes are ambiguous in specific situations; and if friends and colleagues must be held at arm's length by a confidently held view of the individual official's conscience. Ultimately that individual must develop and remain loyal to a conception of the duties of the particular office, in a particular form of government, at a particular time, for a range of issues that occur. (Moore, 1981, pp.27-28)

To argue that officials have an obligation to the public interest does not imply that they cannot develop their own conception of what the public interest is. However, it is expected that they reflect upon societal values since society establishes rights and duties by collective decisions that should bind all (e.g., mandatory school attendance, immunization, car insurance). Warwick (1981) defines the value concept as one that has some good to be promoted (e.g., education) or an evil to be avoided (e.g., illness, alcohol). Musgrave (1969) suggests that, when discussing social wants, "a political process must be substituted for the market mechanism, and individuals must be made to adhere to the group decision" (Musgrave, 1969, pp.10-11). Although it may be perceived as autocratic in nature, "it is considered to be proper that the elite (however defined) should impose its preferences" (Musgrave and Musgrave, 1973, p.81). The ability of citizens in democratic societies to replace the decision-makers is an important factor in motivating politicians to take an interest in promoting citizens' preferences.

The election of a politician does not mean that those who voted for him/her support all or even most of the policies advanced by the candidate. Preferences of citizens, groups and organizations are registered using a variety of means, including public meetings,

delegations, lobbying, marches and letters. Attending meetings, listening to or participating in discussions, writing letters and attempting to persuade others means to many a major sacrifice. Less time is devoted to the job, the family and to hobbies. Wildavsky (1981) suggests that the cost of participation in public affairs seems greater than the return and is the major factor in public apathy.

Another method through which citizens may express a preference on an issue is the use of a plebescite (even though it has been argued that referendum is an expensive means of determining public preference which also weakens government) (Wildavsky, 1981).

Elected officials, it is argued, should reflect upon societal values in the decision-making process. Moore (1981) challenges the view that social values should consist of the sum of individual preferences. He argues that "individual preferences should not be the basis for assigning social values. Instead, society as a whole should establish the value without reference to individual preference" (Moore, 1981, p.17). This position is supported by Price (1981) who objects to securing the private values to the detriment of society and suggests that:

A 'public' interest normally requires a collective articulation and implementation, and the good pursued is often not divisible into shares Human interdependence enters at the point of pursuing the good, not as we conceive of the good or, for that matter, enjoy it. (Price, 1981, p.156)

Dunn's context of values provides a framework which may assist in examining the relationship between the individual's preference and the public interest. The typology suggests that values may be communicated in different forms which correspond to specific contexts as follows: (a) the personal context consisting of expressions of individual desires; (b) the standard context involving group value statements about particular

situations, and (c) the ideal context consisting of value judgements which are not dependent on individual or group desires.

Dunn (1981) suggests that disagreement regarding value judgements cannot be debated rationally and makes reference to the "value relativism" concept which maintains that "statements about such values as equality, justice, and freedom cannot be 'proved' empirically, and, for this reason, are best considered as nonrational expressions of individual desires or emotions" (Dunn, 1981, p.87).

If certain values cannot be debated and have to be taken for granted by the policy analyst, then the "facts" have to be separated from the "values" in the course of analyzing policy problems. The method of analysis, then, is considered to be a neutral instrument (scientific instrumentalism) and the role of policy analysis is limited to the discovery of the best means to realize a given end (Dunn, 1981, pp.87-89). Wildavsky, on the other hand, strongly objects to confining policy analysis to the realization of preferences and argues that since knowledge can bring about change in preferences, the transformation of values should be part of the policy analysis field of inquiry. He suggests that it is not possible to learn about preferences if they are values and one can know only about facts. Wildavsky states that:

. . . we may speak of an objective as fixed, and discuss which of several alternatives will best achieve this objective. In itself this practice does no harm. But if it leads to the belief that objectives or preferences are beyond argument because they comprise 'values', whereas one can quarrel about resources or constraints because they are made up of 'facts', I must dissent. This would mean that the most important part of learning from experience - finding out what one, under specific circumstances, ought to prefer - would be denied If we can reason about means but not ends, if humanity is doomed to apply reasonable means to nonrational (that is, uninspectable) ends, there can be no policy analysis because the analysis involves changing preferences as well as potential action. (Wildavsky, 1979, p.272)

Wildavsky's (1979) major point in his book Speaking Truth to Power is that policy analysts should be able to recommend a combination of means and ends, since policy analysis is an effort to use thought to aid interaction.

Summary of the Chapter

The early studies of organizations focused on the structural arrangement leading towards goal attainment. One of the main criticisms of these studies was that they perceived organizations as closed systems and ignored the environmental forces that affect organizations. A large majority of the studies published in the past two decades have viewed organizations as open systems. This perspective suggests that organizations depend on input such as resources and information from the environment, transform that input and export it back to the environment in the form of a product. Meyer (1978) suggests that organizations have unique properties and share other properties with all open systems.

The literature review suggests that organizations do not operate in isolation and the environment is a critical factor in understanding organizational behaviour. A major environmental factor that organizations must take into consideration is the impact of other organizations, in particular those which are part of their task environment. The concept of "task environment" refers to groups and organizations which are relevant or potentially relevant to goal attainment. Hasenfeld (1983) suggests that organizations in the task environment may provide a variety of the focal organization's needs. These include legitimation and authority, fiscal resources, material resources, clients/consumers and complementary services. In the general environment on the other hand, are factors over which organizations have

little control. These include the political atmosphere, demography and the economy.

Support for the study of interorganizational relations is provided by Hasenfeld and English (1974, p.540) who state that "it is useful to study interorganizational relations in order to understand the conditions that led to the emergence of relationships between organizations." Understanding the nature of interorganizational relations and the conditions in which they are most effective is expected to help in theory development as well as to assist practitioners in organizational design.

Exchange theory is one of the main theoretical perspectives for describing and explaining interorganizational relations. It is suggested that under conditions of resource scarcity and in order to attain goals which are otherwise unachievable, organizations enter into exchange agreements. Another view suggests that interorganizational relations are a form of organizational action adopted to secure resources, reduce uncertainty or gain mastery over the environment (Hasenfeld, 1983; Jackson and Morgan, 1978). In the words of Jackson and Morgan, "As organizations begin to feel pressure both internally and externally, they develop interorganizational relationships or ties with other organizations in the environment to reduce this uncertainty" (Jackson and Morgan, 1978, p.243). Van de Ven observes that an interorganizational relation is a form of resource commitment for organizations and they prefer not to enter into such an agreement unless they are compelled to do so.

Studies of interorganizational relations are classified into two types. The first approach focuses on the interaction between the organization(s) and their environment. It includes studies of the interaction between the focal organization and the units in its

organization set, activities within the task environment, and interaction within a network consisting of a number of organizations interacting in order to attain a specified purpose. The analysis requires examination of the organizations involved, the network and the external environment.

The second approach investigates the comparative and relational purposes of the interacting organizations. The dimensions used to compare the properties of the interacting organizations include homogeneity, resource dependence, turbulence and size of network. The study of relational properties focuses on the dimensions of interorganizational linkages including formalization, intensity, reciprocity and standardization, and on interorganizational coordinating mechanisms.

In several studies, the focal organization is imbedded within the interorganizational network and the latter is located within a larger environment. Another approach views the environment as a social system - a collectivity which is defined as a social action system in which two or more organizations are joined together in order to attain a specific objective or identified goals. Within the collectivity there are three functionally differentiated levels or subsystems (Van de Ven, Emmett, and Koenig, 1974): (a) the productive unit which focuses on a member organization; (b) the subsystem which integrates the differentiated but interdependent members of the interorganizational collectivity, and (c) the subsystem which governs the overall goals and policies, ensures external legitimization and supports the domain of the collectivity.

In summary, the issue of open versus closed system was resolved in favour of the open system approach and the significance of the environment was widely recognized in the study of organizations. Numerous references are made in the literature which advocate further

study of interorganizational relations in order to increase the available empirical data and facilitate theory formulation (Van de Ven, Emmett and Koenig, 1974; Van de Ven, 1976; Perrow, 1979; Whetten, 1981). Several other studies support this position and suggest that little is presently known about the field of interorganizational relations (Zeitz, 1975; Whetten, 1981). Zeitz claims that "we really don't know very much about the actual relations between these organizations, or about the community context."

Finally, relevant literature related to the basis upon which policy makers make decisions is briefly reviewed. It is argued that although advice and claims of friends are important input, a public official has to place them in perspective with his/her conception of duty and the public interest. It is also expected that a public official should reflect societal values. Moore (1981) argues that society as a whole should establish social values without reference to individual preference. A typology proposed by Dunn (1981) helps to examine the relationship between the individual's preference and the public interest and includes (a) the personal context; (b) the group value statement, and (c) the ideal context which involves a value judgement.

The literature review was instrumental in the development of the conceptual and methodological frameworks elaborated in Chapter Three.

CHAPTER 3

METHODOLOGY

Introduction

The literature review in Chapter Two documents that for many years organizational theorists focused attention on the elements in a given organization and on how these elements affected its structure, behaviour pattern and effectiveness. During the past three decades, social scientists have given more attention to the study of the organization and its environment from an open systems perspective. Understanding what constitutes the environment has been the subject of many studies. Dill (1958), Evan (1966), Warren (1967), and Perrow (1979) suggest that organizations engaged in transactions with a focal organization constitute the principal elements of that organization's environment. Interorganizational studies have been developed using at least three different approaches to view the environment (Van de Ven, Emmett and Koenig, 1974). They include:

1. Viewing the environment as an external constraining phenomenon. This approach examines the impact of external environmental factors on the internal properties of an organization.
2. Approaching the environment as a collection of interacting organizations, groups and individuals. The focus of this approach is on the examination of the comparative and relational properties of an interactive network (Marrett, 1971).

3. Viewing the environment as a social system.

The conceptualization of the third approach conceives all social units as part of the total social system and explores the relations among different organizations in this light. Van de Ven, Emmett and Koenig (1974) propose that the analysis of interorganizational relationships at the social system level offers a unique device to incorporate other conceptualizations within this wider one; however, they warn that considerable work is needed to achieve this objective.

Zeitiz (1975) and Whetten (1981) indicate that little is known about the relationships between organizations and the experience of clients in the system. Zeitiz (1975) recognizes the potential benefits of studying interorganizational interaction processes at the societal level, as well as the interorganizational field and suggests that such an approach would enrich theoretical development in the areas of organizational, community and societal theories.

The purpose of this study was to provide a review of the historical developments associated with the Joint Use Agreement among organizations providing educational and recreational services within the City of Edmonton and to analyze problems associated with the agreement. In this chapter, the conceptual framework is presented and the appropriateness of the research strategies and procedure is explained.

Conceptual Framework

Drawing from the critics dealing with the present state of knowledge in the field of interorganizational relations, this study focuses on organizations, groups and individuals interacting in the process of achieving the metasystem goals. The term metasystem is borrowed from Beer (1979). Meta means "over and beyond" and metasystem is conceived in

this study as a larger controlling or regulating system in which those interdependent organizations, individuals and groups are located and in which they attempt to attain individual and overlapping goals. Beer (1979) also introduces the concept of "theorem of recursion" which is based on the premise that all viable systems contain, and are contained in, other viable systems. He describes the model in the form of an isomorphic map in which the lines represent a level of recursion. Although Beer's metasystem is discussed in the context of an enterprise which contains several recursion levels - a corporation, divisions, companies and plants - this concept was also applied by Rees (1983) in the study of a manpower institutional training system in Manitoba. Special attention is given to these three levels in this case study of the Joint Use Agreement between the City and the two school systems in Edmonton.

The question of the applicability of a methodology used in intraorganizational studies to the interorganizational field has been raised by several researchers. Litwak and Hylton (1962) differentiate between the two levels of analysis suggesting that in the interorganizational field there is usually a partial conflict between firms, and if conflicting values were to exist within an organization, it would lead to a breakdown in the organizational structure and impair the organizational ability to function. This position cannot be supported by this writer. Litwak and Hylton (1962) do not take into consideration that many agreements among organizations are derived voluntarily in the process - of achieving a common goal. Furthermore, within many organizations experiencing budgetary restraint, units are competing for limited resources (e.g., zero-based budgeting), and are developing conflicts within the organization. Additional support for the

applicability of intraorganizational theory to that of interorganizational studies is provided by Crozier (1972) and White (1974). White (1974) reviews a number of studies of intra- and interorganizational behavior in the context of a single unified framework and concludes that:

In view of the employment of 'open-system' perspectives and with the increasing interest in the organizational environment (Starbuck, 1973), it seems reasonable to employ dimensions in studying intra and interorganizational behavior. (White, 1974, p.145)

Van de Ven, Emmett and Koenig's (1974) conceptualization of the interorganizational collectivity views it as a system and as such the collectivity can be compared to an organization. Both consist of a collection of units and individuals who interact in the process of achieving a common goal. As systems, the collectivity and the organization each have their input, throughput, output and other system characteristics.

Two assumptions made in applying the methodological framework to the case study are:

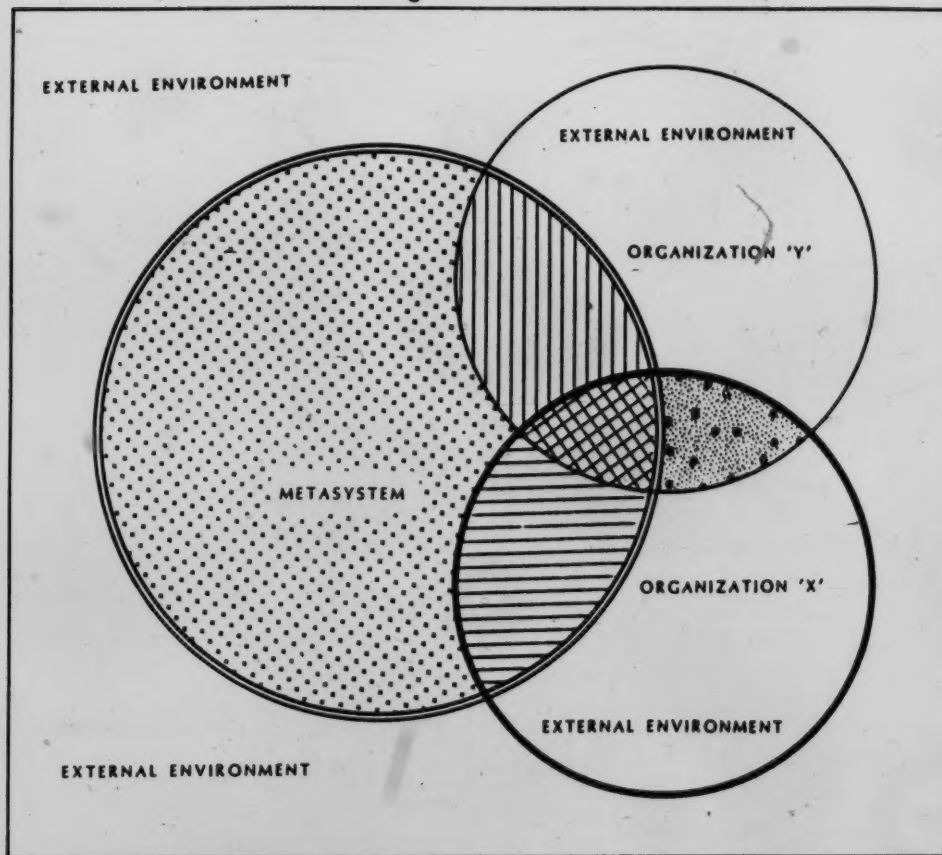
1. The metasystem activities are more inclusive than those activities enacted by organizations in direct interaction. Therefore, the space to be studied should not be limited to the pattern formed by the intersection of the organizations as in network analysis but should include the exploration of implicit and explicit links.

2. The activities of the metasystem are performed by more than just the organizations. Activities of groups and individuals who do not belong to the formal organizations and do not necessarily have formal boundary spanning roles are part and parcel of the collectivity (Van de Ven, Emmett and Koenig, 1974).

Figure 3.1 illustrates the conceptual framework which is applied in this study, where the interorganizational collectivity is conceived as a metasystem. Figure 3.1 illustrates a simplistic form of a metasystem comprised of two organizations interacting within and outside the boundary of the specific metasystem. The external environment is considered to be an important source of influence over organizations and the metasystem as a whole. It includes the general environment which consists of such variables as the economy, demography and the political scene. Reference to this environment was made in the literature review where it was assumed that, in general, organizations and metasystems have little control over the general environment. The external environment also includes units or departments in the metasystem's organizations which operate in areas outside the metasystem. The provincial government is perceived to be located in the external environment although the Minister of Education is considered to be part of the metasystem since, in accordance with the School Act, the individual in this position has to approve a Joint Use Agreement before it can come into effect.

Figure 3.2 identifies the metasystem in the case study. It includes: (a) the three organizations that were signatories to the agreement: The City of Edmonton, the public and the separate school districts; (b) the Joint Planning Committee established to implement the terms of the agreement and coordinate its activities; (c) groups involved directly and indirectly in the operation of the agreement, including groups with city-wide interests such as the Federation of Community Leagues and the Edmonton Area Home and School Association and groups representing local interests, and (d) individuals affected by the agreement including users of the facilities and taxpayers who could benefit from an efficient and

Figure 3:1



GRAPHIC ILLUSTRATION OF AN INTERORGANIZATIONAL COLLECTIVITY AS A METASYSTEM

LEGEND

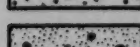
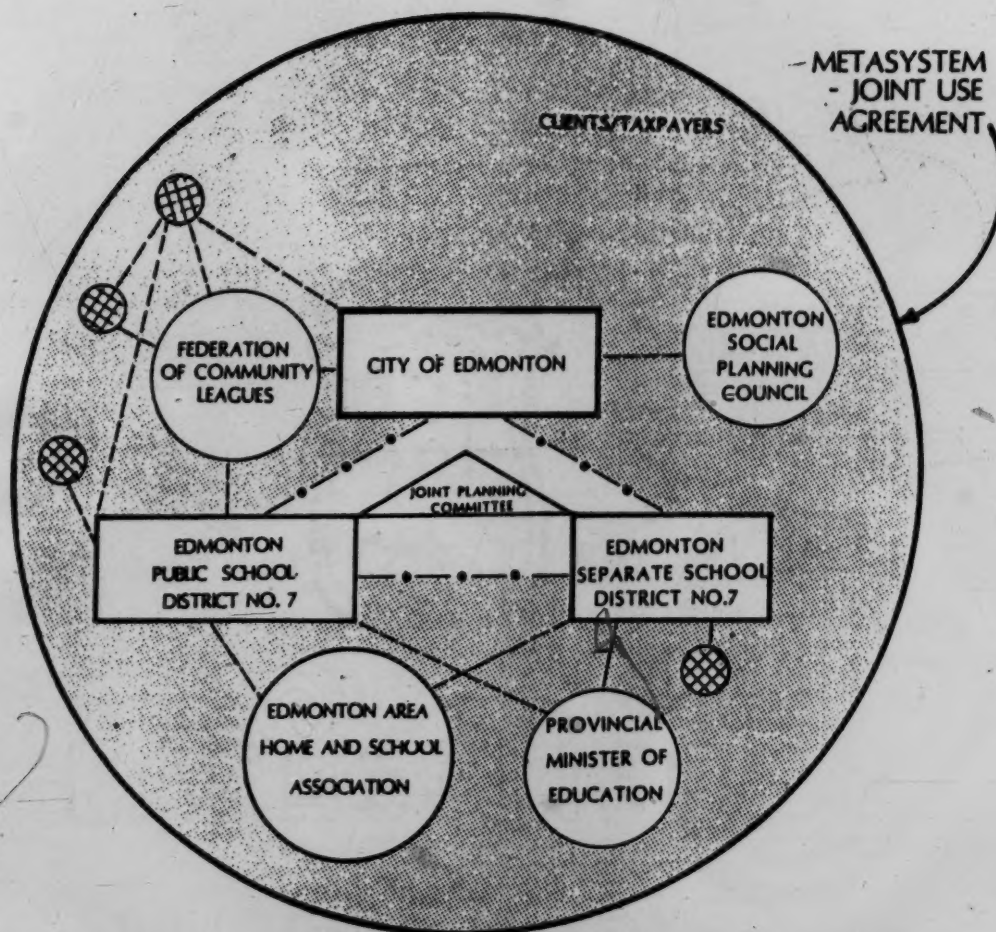
-  BOUNDARIES OF THE METASYSTEM
-  BOUNDARIES OF ORGANIZATION 'x'
-  BOUNDARIES OF ORGANIZATION 'y'
-  METASYSTEM ACTIVITIES PERFORMED BY ORGANIZATION 'x'
-  METASYSTEM ACTIVITIES PERFORMED BY ORGANIZATION 'y'
-  METASYSTEM ACTIVITIES PERFORMED BY ORGANIZATIONS 'x & y'
-  METASYSTEM ACTIVITIES PERFORMED BY GROUPS AND INDIVIDUALS EXTERNAL TO ORGANIZATIONS 'x & y'
-  INTERACTION OF ORGANIZATIONS 'x & y' OUTSIDE THE METASYSTEM

Figure 3:2



GRAPHIC ILLUSTRATION OF THE METASYSTEM INVOLVED WITH THE JOINT USE AGREEMENT

LEGEND



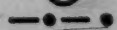
SIGNATORIES TO THE JOINT USE SYSTEM



LOCAL GROUPS INVOLVED IN THE JOINT USE SYSTEM



DISTRICT/CITYWIDE GROUPS INVOLVED IN THE JOINT SYSTEM



COORDINATING MECHANISM



INDIVIDUALS - AFFECTED BY THE JOINT USE SYSTEM - TAXPAYERS, CLIENTS



INTERACTION WITHIN THE METASYSTEM INVOLVING GROUPS OTHER THAN THE SIGNATORIES TO THE AGREEMENT

effective utilization of the facilities.

Methodological Framework

Considering the nature of the problem statement and following a preliminary review of related documents and two exploratory interviews conducted with individuals who were involved with the Joint Use Agreement in the 1970's, the researcher decided that a descriptive and interpretive case study employing qualitative research strategies would provide an appropriate methodological framework for the study. With reference to decisions regarding the choice of methodology, Rist (1979) states that "the decision on the style of research one chooses to employ should be a matter of informed judgement, not of orthodoxy" (Rist, 1979, p.18). This section provides some insight into the nature and characteristics of qualitative research and outlines the nature of case study research.

Qualitative Research

Interest in qualitative research methodologies in the study of organizations seems to have experienced a renewal in recent years. Das (1983) attributes the increase in the popularity of qualitative approaches since the middle of the 1970's to a number of factors, including:

1. Distrust and scepticism among organizational observers of findings emerging from studies using traditional tools;
2. Preference for a more holistic view of organizational behaviour;
3. Awareness that organizational behaviour can be studied adequately only in its natural setting;

4. Recognition that longitudinal, in-depth and open-ended research designs are necessary to capture the complex and multi-dimensional behaviour patterns within organizations;

5. Realization that qualitative observations may generate unexpected phenomena which could form the basis of new hypotheses, and

6. Recognition that qualitative techniques are the only valid means to identify and delineate certain organizational phenomena.

The popularity of qualitative research has also extended to the educational field. Bogdan and Biklen, in the preface to their book Qualitative Research for Education: An Introduction to Theory and Methods state that:

Educational research is changing. A field once dominated by measurement, operationalized definitions, variables, and empirical fact has had to make room for a research approach gaining in popularity, one that emphasizes inductive analysis, description, and the study of people's perceptions Qualitative research techniques such as participant observation and indepth interviewing are respected and regularly employed in the social sciences, particularly in sociology and anthropology. (Bogdan and Biklen, 1982, p.xiii)

"Qualitative approach" is an umbrella term which refers to several research strategies that share certain characteristics: (a) the natural setting is the direct source of data; (b) the researcher is considered as the key instrument; (c) the data collected and used are descriptive (emphasis on words rather than numbers); (d) the researcher is concerned with context and process rather than simply with outcome or products; (e) the research tends to analyze the data inductively rather than attempting to prove or disprove hypotheses, and (f) the 'meaning' is of essential concern to the researcher (Bogdan and Bilken, 1982, p.27-29). Some of these characteristics are also mentioned by Miles and Hubermen (1984) who describe the nature of qualitative data as:

. . . a source of well-grounded, rich description and explanation of process occurring in the local context. With qualitative data, one can preserve chronological flow, assess local causality, and drive fruitful explanations. Serendipitous findings can appear. (Miles and Huberman, 1984, pp.21-22)

A number of research approaches, each with its own emphasis, are considered to be qualitative. The approach chosen for the study of the Joint Use Agreement is that of a case study, which includes characteristics of the exploratory/heuristic and responsive naturalistic approaches. Kaplan (1964) describes an heuristic type of inquiry as one which is designed to "generate ideas, to provide leads for further inquiry or to open up new lines of investigation" (Kaplan, 1964, p.149). The distinguishing features of naturalistic inquiry are the natural setting in which the research is carried out, the use of case study format and the heavy reliance on qualitative rather than quantitative methods. Guba and Lincoln (1982) suggest that each approach has advantages over and above the fact that each will handle different types of data. The quantitative methods have a high degree of precision and are mathematically manipulable. The qualitative methods, on the other hand, are "richer" and can deal with phenomena not easily translatable into numbers. The techniques suggested to be appropriate to naturalistic inquiry include interviews, observations, use of nonverbal cues and unobtrusive measures and documentary and record analysis. The investigator, it is suggested, enters the field largely without an a priori theory or hypotheses to be tested and is unable to specify the design in advance. This study is not considered to be a naturalistic study although the design emerged as the inquiry proceeded. It emerged within "bounds" established in advance based on the sub-problems raised

in this study as well as the conceptual framework adopted for this investigation.

Changes in the direction of the study are indicated as being a common occurrence in case studies. Wilson (1977) suggests that investigators using a case study method are "constantly making decisions that are strategic to both the direction of a study's progression and to the propositions that are developed and modified throughout the study" (Wilson, 1977, p.255).

Case Study

The case study approach has been widely used in research. In 1953, Selznick used the case-analysis method in studying the Tennessee Valley Authority and reconstructed the conditions and forces which appeared to have shaped the behaviour of the participants. Two years later, Blau (1955), in a book entitled The Dynamics of Bureaucracy, reported on the study of two government agencies and suggested that while this method is not reliable for testing hypotheses, it has major advantages in yielding reliable systematic data and in examining social processes directly. This methodology has since been widely used and has been supported by researchers using qualitative methods of inquiry (Denzin, 1978; Stake, 1978; Bogdan and Biklen, 1982; Guba and Lincoln, 1982).

The definition of a case study does not appear to be very restrictive. Stake (1978) refers to any "bounded system" as having the potential to become a case study. It can consist of an institution, a program, a responsibility, a collection or a population. Bogdan and Biklen (1982) define a case study as a "detailed examination of one setting, or one single subject, or one single depository of documents, or one particular event" (Bogdan and Biklen, 1982, p.58). They suggest that

a case study is best represented as a funnel which moves from a broad exploratory beginning to a more direct data collection and analysis. Some of the characteristics of a case study suggested by Stake (1978) include:

1. Descriptions are complex, holistic and involve a myriad of variables not isolated from one another;
2. Data are partially gathered by personalistic observations;
3. Writing style is informal, perhaps narrative with verbatim quotations and illustrations;
4. Understanding the case is more important than the hypotheses on the themes;
5. It proliferates rather than narrows and one is left with more to pay attention to rather than less;
6. What is happening within the boundaries of the case study determines what the study is about rather than the predetermined hypotheses or issues.

Stake (1978) observes that case studies are useful in adding to existing experience and humanistic understanding. He predicts that:

Case studies are likely to continue to be popular because of their style and to be useful for exploration for those who search for explanatory laws. And, moreover, because of the universality and importance of experimental understanding and because of their compatibility with such understanding, case studies can be expected to continue to have an epistemological advantage over other enquiry methods as a basis for naturalistic generalization. . . . This method has been tried and found to be a direct and satisfying way of adding to experience and improving understanding. (Stake, 1978, p.7)

Bogdan and Biklen (1982) identify different types of qualitative case studies each with its considerations for determining the feasibility for study and the procedures to employ. The three main types are the historical-organizational case study, the observational case study and

the life history. This study of interorganizational relations within the City of Edmonton focused on conflicts and pressure placed on focal organizations and the metasystem over a period of ten years between 1970 and 1980. Therefore, the historical organizational case study research design proposed by Bogdan and Biklen (1982) was deemed appropriate for the study.

The Historical Organizational Case Study

The historical organizational case study "concentrates on a particular organization over time, tracing the organization's development" (Bogdan and Biklen, 1982, p.59). The writers warn potential researchers in this area that many times this type of a case study is not feasible for lack of sufficient sources of data. The data gathering techniques most frequently used are interviews and document collection and analysis.

Since the case study focuses on interorganizational relations, it is noteworthy that the value of insights gained through the use of an historical perspective was mentioned by a number of writers in the field of interorganizational analysis. Child (1972) refers to the role of 'strategic choice' in organizational theory and indicates that past decisions have an impact on current situations and circumstances. Rees (1983), in her study of the manpower institutional training system in Manitoba, presents a case for examining the establishment and development of that particular metasystem using an historical perspective. In the context of this study, the researcher, prior to commencing the study, ensured access to minutes of Public School Board meetings, reports from city council meetings, local media material and relevant files located in the Public School District archives and the City of Edmonton archives.

Furthermore, preliminary interviews with two individuals who were key actors during the period under investigation led the researcher to believe that sufficient information was available to justify undertaking this study.

Research Strategies and Procedures

Focusing the study

Reference was made earlier in this chapter to a funnel being the best descriptor of the general design and research process of a case study. It has a broad exploratory beginning and a narrow end which reflects the data collected and analyzed. Bogdan and Biklen's (1982) perception of a typical process used by an investigator in a case study approach is quoted below. This is followed by an outline of the experience of the researcher in this case study with a change in focus. Bogdan and Biklen (1982) describe the funnel in the following way:

The start of the study is the wide end: the researchers scout for possible places and people that might be the subject on the source of data, find the location they think they want to study, and then cast a net widely trying to judge the feasibility of the site or data source for their purposes. They look for clues on how they might proceed and what might be feasible to do. They begin to collect data, reviewing and exploring it, and making decisions about where to go with the study. They decide how to distribute their time, who to interview and what to explore in depth. They may throw aside old ideas and plan and develop new ones. They continually modify the design and choose procedures as they learn more about the topic of study. In time, they make specific decisions on what aspect of the setting, subject, or data source they will study. Their work develops a focus. The data collection and research activities narrow to sites, subjects, materials, topics and themes. From a broad exploratory beginning they move to more direct data collection and analysis. (Bogdan and Biklen, 1982, p.59)

The initial intention in this study was to follow Van de Ven's (1976) suggestion for studying an interorganizational collectivity by focusing on the identification of the metasystem and its process and structure.

In order to provide the reader with some indication of the broad scope of the initial research design, elements of the original plan are listed below:

1. Identification of the metasystem including the reasons for its formation, the environmental conditions surrounding it, dimensions of the interorganizational linkages including formalization, standardization, reciprocity and centralization (Marrett, 1971):

2. The metasystem process including (a) development of a flow chart representing activities of the relevant population contributing to goal attainment; (b) mapping the flow of resources in order to better understand the input, throughout and output within the metasystem; (c) obtaining perceptions of individuals at various levels of the metasystem about the agreement and its implementation (e.g., school principals and staff, Parks and Recreation staff, school district, central office and district personnel, booking personnel, and representatives on the Joint Planning Committee), and (d) identification of clients' perceptions regarding access to public facilities, e.g., availability of recreational facilities such as swimming pools for school use and community access to schools.

3. The metasystem structure with special focus on the respective roles of the three functional levels within the metasystem in the development and implementation of the agreement. The three levels include the operational/technical, managerial/administrative and the institutional (Rees, 1983).

Adding to the complexity was the time element involved. The first agreement was signed in 1959, and major changes subsequently took place in 1966 and 1980. One possibility considered was to extend the study to include the entire period, although there was a danger that little

relevant and useful data would be found about the early years (e.g., perceptions regarding the implementation of the agreement in early years or availability of the individuals involved with the development and implementation of the agreement).

The initial data collection and analysis which took place during the period between June 1985 and June 1986 revealed several key events and activities that were perceived to have played a significant role in the interaction of the focal organizations within the metasystem. Considering the scope of study, the researcher had to decide whether to continue with the initial plan and cover a wide range of topics within the metasystem but risk the possible shallow treatment of significant events and activities (e.g., community schools, West-10 experimental project, and Commission on Educational Planning) or focus on them along with the evolution and dimensions of the metasystem. The opportunity for an exploratory in-depth study with the potential of adding to the understanding of interorganizational relations in general and the case study in particular was too attractive to be missed. It should be noted that the researcher has a planning background and holds the position of Assistant Superintendent Planning with the Edmonton Public School Board. He has been involved with the use of traditional quantitative studies in the past. The experience of undertaking a case study in which a detailed plan was not part of the design and the course of the study could change with the information collected was new to him, and he decided to take on the challenge.

As the design of the study emerged, it was influenced by the information gathered. Two examples are: (a) the search in the City Archives revealed the City's submission to the Commission on Educational Planning, and (b) the Superintendent of the Public School Board pointed

out the West-10 experiment - a project, supported by the Mayor and sponsored by the City of Edmonton and more senior levels of government, that had had the potential of restructuring education. This new information resulted in a more detailed examination of the two phenomena, which were then found to be associated with and relevant to the Joint Use Agreement.

Consideration was given to narrowing the time frame of the study following advice to that effect received from a member of the Committee during the Candidacy Examination, but it was decided that some of the data should be examined prior to reducing the scope of the study. When it became apparent that most of the events and activities associated with the Joint Use Agreement took place in the early 1970's and that the agreement had been signed in 1980 following almost a decade of controversy, it was decided to limit the study to the 1970's and to include information beyond this period only for purposes of clarification and continuity.

Data Collection Strategy

The historical nature of the research problem and the researcher's desire to use more than one source of data to examine each sub-problem, event or activity were the major factors which guided the choice of research strategy which is reflected in the collection of data. Furthermore, the researcher's association with the Edmonton Public School District as a Planner, Director and Assistant Superintendent during the period 1978-1986 made the identification of data sources and the access to relevant documents and individuals relatively easy. The research strategies chosen and applied in this study were interviews and document searches which included historical organizational documents, related

reports, letters and memoranda, and articles published in the mass media. The process of data collection in the study was allowed to evolve or unfold rather than being predetermined in rigid detail. As a result, a large number of the interviewees were identified only after the study commenced. This was true also of the search for a number of relevant reports which were not known to the researcher at the beginning of the study. In the following section, the two research strategies for data collection are presented. It commences with a brief review of the relevant literature and is followed by a description of the procedures used in this study.

The Interview

Interviews are considered to be a major strategy employed by social scientists. An interview is a purposeful conversation between two and sometimes more people that is directed by one of the participants for the purpose of receiving information (Bogdan and Biklen, 1982). Das (1983) defines an interview as a method designed "to identify a respondent's attitudes, motives and behaviour by encouraging the person to talk freely and to express his or her ideas on the subject matter under discussion" (Das, 1983, p.308). A similar definition was also advanced by Denzin (1978) who states that "an interview is a face to face verbal interchange in which one person, the investigator, attempts to elicit information or expressions of opinion or belief from another person or persons" (Denzin, 1978, p.113). He adds that an interview represents the basic mode by which the investigator carries on an interaction with the empirical world.

Interviews vary in the degree to which they are structured and standardized. In a structured and standardized interview, the wording of

all questions is the same and they are asked in the same order. In such a case, variation is then not attributed to the interviewer or the instrument but to the response alone. At the other extreme, the non-standardized unstructured interview contains no specific set of questions and therefore follows no specific order. Between these two extreme cases, there are semi-structured questionnaires which require that all respondents address pre-determined questions or topics but provide the interviewer with the flexibility to phrase the questions and order the interview on an individual basis. Maccoby and Maccoby (1954) compare the different types of interviews and suggest that the unstructured, non-standardized interview is best suited for exploratory studies, while the structured, scheduled, standardized interview is superior for hypothesis testing and vigorous quantification of results. Guba (1981) argues from a naturalistic perspective that the unstructured interview is the most appropriate of the interview methods "to search for multiple realities, truth, and perceptions" (Guba, 1981, p.157).

The non-standardized, unstructured interview is termed by Dexter (1970) to be an "elite interview." In such an interview, the interviewee is not only allowed but is encouraged to present his/her own version of the situation. Dexter (1970, p.5) emphasizes the importance of "letting the interviewee introduce to a considerable extent . . . his notions of what he regards as relevant, instead of relying upon the investigator's notions of relevance." Dexter (1970) also notes that the "elite interview" has been adopted more frequently by researchers who interview well-informed, influential and prominent individuals. The reason for so-doing is that such people sometimes insist on explaining their own account of the situation and are reluctant to accept the assumptions with which the interviewer starts. Dexter (1970) cautions researchers

planning to use this approach against placing excessive demands on the interviewee's time and patience. He also advises them to maintain the confidentiality of all conversations and to avoid excessive reliance upon these interviews so that "if the elite interviews prove basically uninformative some other techniques can be substituted" (Dexter, 1970, p.17).

Denzin (1979, p.123) summarizes his discussion of the various interview methods by suggesting that "the issue resolves largely into the personal preferences of the investigator, the intent of the investigation, the available resources, and the investigator's decision concerning what type of interaction is desired."

Two types of interviews were employed in this study. The 'elite interview' format was used with the key informants in order to obtain in-depth information as well as gain understanding of a wide range of related issues. The interviews ranged between one and three hours and varied in the level of intensity. The interviewees were encouraged to talk freely and express their views on the subject matter under discussion. This open-ended approach resulted in a significant number of leads and clues regarding events and documents previously unknown to the researcher. Information from the key informants as well as organizational documents formed the basis for the initial list of interviewees which was then supplemented as appropriate during the study period. The elected officials who represented their organizations on the Joint Use Agreement Review Committee in the early 1970's were prime candidates to recapture the content of the committee's work using summaries of their interviews as the basis for the detailed description. The researcher ensured that at least three individuals from each of the focal organizations were interviewed, of which at least one was an

elected official and one a senior administrator. All had served during the 1970's. A number of other interviewees were selected as a result of their past involvement with a particular issue or event under study. With only one exception, the researcher was able to gain access to all the individuals selected for the study. In total, 28 individuals were interviewed.

The type of interview administered to the majority of the interviewees could be termed "semi-structured." Although the interviewees were allowed to pursue related topics and "shape" the content of each interview, a general interview schedule was developed listing the issues and the questions the interviewer intended to cover and was used to ensure that they were addressed. On rare occasions it was necessary to gently nudge interviewees back on track. It appeared as if individuals no longer in public office or holding administrative positions were eager to share their past experiences and contributions (relevant to the study or not).

During the semi-structured interviews and towards the end of each of the non-structured interviews, the researcher probed further into the interviewees' comments, asking for examples and further elaboration of points made. This was done in order to ensure that maximum relevant information was collected and that the interviewee's perception was well understood by the interviewer. Every effort was made to avoid questions that could be answered by "yes" or "no." During the interview, the interviewer made notes which enabled him to provide a verbal summary of the interviewee's main points at the end of the interview. This technique also helped to confirm the interviewer's understanding and thereby enhance the credibility and dependability of the findings. Applying this approach required that the interviewer come well-prepared

to every interview, which meant reviewing the written documents and other interviews pertaining to the issues to be discussed. On a number of occasions, the researcher brought along documents and had the interviewees react to them towards the end of the interview. This helped them to "sharpen" their memories and to "relive" historical events.

The arrangements for the interviews were made about one week in advance and the interviewees were informed about the nature of the study and some of the topics to be covered. This provided the interviewees with an opportunity to prepare for the interview. In some cases, organizational documents and other related reports were brought in support of the interviewee's position. These were made available to the researcher at the end of the interview. It should be noted that the researcher presented himself to individuals who did not know him as a graduate student undertaking a doctoral study and attempted to avoid being identified as a member of a specific organization. This was done in order that he be perceived as an unbiased, objective investigator. The range of information shared with the investigator (both relevant and irrelevant to the study) on a number of occasions suggests that interviewees felt at ease during the interview and that the researcher was accepted as an independent observer.

A further method used to gather very specific information was the telephone conversation. On a few occasions the researcher contacted individuals and, after introducing himself and the study, asked specific questions. These conversations lasted between 10 and 30 minutes and included a request for legal interpretation of a government act, a follow-up on an interview and a request for an individual's perspective on an issue raised in a specific document.

Historical Documents

A number of writers consider various types of written documents as important data sources for social research (Bogdan and Taylor, 1975; Denzin, 1978; Lawler, et al., 1980; Staw and Sz wajkowski, 1976). Denzin (1978) objects to the exclusive use of interviews or questionnaires in social science research and suggests that they be combined with unobtrusive measures. This source of data "removes the researcher from the set of direct interaction or interviews which commonly form the basis of case studies" (Denzin, 1978, p.256). Public archival documents represent one major class of unobtrusive data because their production was not related to or influenced by the researcher. Lawler et al., (1980) observed that the documents, records and other written material in the possession of organizations form the richest source of unobtrusive data. However, Bogdan and Taylor (1975, p.100) caution that "the researcher will almost always have to imaginatively and aggressively search them out," because organizational records are sensitive and sometimes confidential documents. According to these writers, the written records "should be viewed not as objective data, but rather, as expressions of the people who write and keep them" (Bogdan and Taylor, 1975, p.73). Such documents are important for a qualitative case study for additional reasons. They can alert the researcher to potentially fruitful lines of inquiry and lend insight into the perspectives, assumptions and purposes of their authors (Bogdan and Taylor, 1975).

Staw and Sz wajkowski (1976) also recognized the significance of documentary search in the study of organizations. They suggested that:

. . . the primary advantages of archival analysis lie in the nonreactivity of measurements and the relative low cost of getting data from a wide number of organizations. The primary disadvantage of archival research lies in the rigidity of the data base. Archival data may not be available on critical

variables or data that is available may not be suitable for statistical analysis. Even with these liabilities, however, research in the organizational area has only barely touched the potential pool of useful archival data on the internal behaviour of formal organizations and the actions of organizations in their environments. (Staw and Szajkowski, 1976, p.352)

In this study, the historical documents were located in a variety of sites. They included the City and the Public School Board archives, elected officials' and administrators' offices, libraries of organizations relevant to the case study (e.g., West-10, Edmonton Social Planning Council) and document storage. The archival documents consisted of primary and secondary sources and included: copies of past Joint Use Agreements, reports to City Council, Public and Separate School Boards, minutes of Public School Board meetings, minutes of various metasystem committee meetings (e.g., Joint Planning Committee, Joint Use Agreement Review Committee), administrative and consultants' reports, position papers, briefs, letters, memoranda and working documents. It should be noted that the Public School Board minutes provided significant insight into the perspectives and concerns of the Board and individual trustees concerning the specific issue being discussed. The Separate School Board Minutes, on the other hand, were found to be extremely brief and consisted mainly of the motion carried or defeated and the name of the trustees who seconded it. The gap in the availability of data from these sources is reflected in the study.

Other sources of data included various provincial government acts, provincial policies, position papers, the report of the Commission on Educational Planning and press releases. Newspaper articles from the local paper and clippings on relevant issues from an outside paper were also considered an important source of information which contributed to

understanding the various perspectives associated with events under study.

The use of historical documents proved to be extremely valuable in this study. Not only did it enable the researcher to follow developments over time, but it enabled the triangulation and cross-validation of data derived from the interviews.

Process of Data Analysis

Data analysis is referred to as a "process which entails an effort to formally identify themes and to construct hypotheses (ideas) as they are suggested by data and an attempt to demonstrate support for those themes and hypotheses" (Bogdan and Taylor, 1975, p.79). The data analysis in this study commenced with the initial collection of data and continued after the collection was completed. The steps of collecting historical documents, interviewing, coding and analyzing the data were done concurrently. There was a constant shift from one type of activity to another.

Bogdan and Biklen (1982) outline a similar process by which data analysis is more intensive at the later stages of the study, but still is an on-going part of the research. In a qualitative case study, it is important that data collection, coding and analysis be an on-going process throughout the study since the information obtained determines the focus of the study and directs future interviews and additional data collection (Glaser and Strauss, 1967). In a study that is "emerging" and where analysis can alter data collection, as opposed to one based on a pre-determined course of data collection and analysis, it is essential that the analysis be part of the entire data collection process.

The data analysis in this study was guided by procedures suggested by a number of writers. Bogdan and Biklen (1982) emphasize the development of categories based on the specific setting under study and the identification of subcategories based on chronological order. Turner's (1981) comments on the main activities leading to the development of grounded theory proved to be very useful (see Table 3.1).

Three different codes were used in this study. Letters were used to identify the main sources of data (e.g., minutes of Public School Board meetings, reports to City Council, articles from local newspaper, interview reports). Numbers were used to identify each of the pages of the various documents, which were also organized in a chronological order, and small coloured stickers were placed alongside the paragraphs of the documents. Nine different colors identified the main issues under study (e.g., land, community schools, controversy over alcohol). It is noteworthy that a number of issues emerged during the study and new categories had to be established. This form of coding enabled the easy identification not only of data sources and their chronological order but also of the topic being discussed. It was also helpful in the process of assembling the data in determining additional information required and in performing the triangulation of the different sources of data.

Triangulation of data sources, which is outlined in the next section, was a key research method used in analyzing the data. In addition, Dunn's (1981) typology of contextual values was used to analyze the policy arguments in the conflict over the consumption of alcohol on school property. This analysis is presented in Chapter Six.

Page Number 79 Table 3.1 entitled Schematic List of Stages in the
Development of Grounded Theory was removed because of copyright
restrictions. The source of this table is: Turner, 1981, p.231.

Triangulation

The basic theme in Denzin's (1978) book, entitled The Research Act - A Theoretical Introduction to Sociological Methods, is the repeated suggestion that researchers examine a problem from as many different methodological perspectives as possible. He broadly defines triangulation as the combination of methodologies in the study of the same phenomena and urges that:

... multiple methods should be used in every investigation, since no method is ever free of rival causal factors (and thus leads to completely sound propositions), can ever completely satisfy the demands of interaction theory, or can ever completely reveal all the relevant features of empirical reality necessary for testing or developing a theory. (Denzin, 1978, p.28)

Triangulation is not limited to the use of data. According to Denzin (1978) it can involve a variety of observers or investigators, theories or perspectives, and methodologies all in pursuit of addressing the same theoretical question. In explaining the data triangulation which is applicable to this study, he stated that, "researchers explicitly search for as many different data sources as possible which bear upon the events under analysis" (Denzin, 1978, p.295).

In general, it is assumed that multiple methods increase the accuracy of the research findings (Bowchard, 1976; Denzin, 1978; Jick, 1979). In support of the use of triangulation, Jick (1979) suggests that this research strategy:

... can be something other than scaling, reliability, and convergent validation. It can also capture a more complete, holistic, and contextual portrayal of the unit(s) under study. That is, beyond the analysis of overlapping variance, the use of multiple measures may also uncover some unique variance which otherwise may have been neglected by simple methods. It is here that qualitative methods, in particular, can play an especially prominent role by eliciting data and suggesting conclusions to which other methods would be blind. Elements of the context are illuminated. In this sense, triangulation may be used not only to examine the same phenomena from multiple

perspectives, but also enrich our understanding by allowing for new deeper dimensions to emerge. (Jick, 1979, p.603)

Jick (1979) also advocates the use of triangulation on the basis of the opportunities it provides the researcher to: (a) achieve higher levels of confidence in the results; (b) stimulate the creation of inventive methods of data collection and analysis; (c) uncover the deviant dimension of a phenomenon; (d) enrich explanation of the research results, and (e) serve as a critical test for competing theories. Norwithstanding these advantages, Jick (1979) identified two main shortcomings of the method of which the researcher should be aware: (a) reapplication is difficult; (b) the strategy may not be suitable to all research purposes. Funding and time constraints may prevent its effectiveness.

In this study, it was necessary to create an accurate picture, to identify the issues associated with the Joint Use Agreement and the different perspectives on these issues. Triangulation of the various data sources was employed in order to ensure that the different perspectives were represented accurately and that the researcher could obtain a good understanding of the issues under study.

Trustworthiness in Qualitative Research

The ability of researchers to demonstrate the validity of their findings is an important aspect in scientific research. The issue of validity or trustworthiness of qualitative research has received the attention of a number of writers in recent years (Bogdan and Biklen, 1982; Cusick, 1981; Guba, 1981; Guba and Lincoln, 1982; Lecompt and Goetz, 1982; Owen, 1982). Guba (1981) identifies four aspects of trustworthiness in research - "truth value," "applicability,"

"consistency," and "neutrality." The following questions raised with regard to Guba's (1981) four aspects provide some insight into their meaning:

1. Truth Value - How confident are we in the findings?
2. Applicability - Can the findings be generalized and are they transferable to other contexts?
3. Consistency - How stable is the data? Would a replicated study reach similar findings?
4. Neutrality - How objective are the findings?

A number of these aspects which appear to be somewhat related are discussed in the literature. Lecompt and Goetz (1982) define reliability as the "extent to which studies can be replicated. It requires that a researcher using the same methods can obtain the same results as those of a prior study" (Lecompt and Goetz, 1982, p.35). They argue that unique situations cannot be replicated precisely and further that human behaviour is never static but changes over time. As a result, regardless of the methods used, exact replication is impossible to achieve. Bogdan and Biklen (1982) also support this view, noting that the qualitative research approach does not expect that two researchers independently studying the same setting or objects will arrive at similar findings. In their opinion, reliability refers to the fit between what the researcher records and what actually occurs in the setting under study. This position can be supported by the high probability that researchers who come from various backgrounds are likely to use different types of data, employ different theoretical perspectives and thereby derive different conclusions to the same problem statement. Cusick (1981) is not overly concerned about the criticism that qualitative case studies are too subjective and theoretically vague. He argues that the researcher's role

in such a study is always unique, personal and very sensitive, and cites Becker (1958) to suggest that the worthwhileness of this approach is not theoretically predetermined, but rather lies with the plausibility of the data presented to the critical reader.

The concept of generalization is given attention by the naturalistic model of inquiry which discounts its value in human social systems. It is argued that "it is virtually impossible to imagine any human behavior that is not heavily mediated by the context in which it occurs" (Guba and Lincoln, 1981, p.62). The researcher's neutrality or objectivity is another aspect discussed in the literature. Owen (1982) perceives the role of the researcher to be significant in the investigative and interpretive process in qualitative research. However, the concern regarding credibility, neutrality and confirmability lies not with the researcher but rather with the collection, analysis and interpretation of the data and the research findings. Owen (1982) states that:

In order to avoid unreliable, biased or opinionated data, the naturalistic inquirer seeks not some 'objectivity' brought about through methodology but, rather, strives for validity through personalized, intimate understandings of phenomena stressing 'close in' observations to achieve factual, reliable, and confirmable data. (Owen, 1982, p.10)

Guba and Lincoln (1982) and Lecompt and Goetz (1982) agree that it is impossible to achieve the goal of guaranteed trustworthiness or the attainment of absolute validity and reliability. However, in their view, several measures could be taken to persuade the reader and the consumer of the meaningfulness of a study. Guba and Lincoln (1982) and Owen (1982) recommend procedures to enhance credibility, dependability and conformability of a qualitative study. They suggest the employment of triangulation, prolonged data gathering on site, maintenance of an audit trail, development of thick descriptions and engagements in peer

consultation. These suggestions guided the researcher throughout the study. Research strategies employed in order to enhance the validity of the study were:

1. The triangulation technique, used to provide cross-validation of each set of data collected from interviews with that collected from other sources.

2. The audit trail procedure, involving the preservation of all raw data, of interview guidelines, notes and summaries, and of the record of procedures and guidelines used for data collection, coding and analysis.

3. Undertaking consultations with interested peers to discuss strategies and to progress away from the setting.

Finally, it should be noted that the researcher's knowledge and awareness of the culture of the organizations and their external environment made the understanding of the respective positions as well as the events, activities and issues pertaining to this study an easier and faster process than otherwise would have been the case. Furthermore, familiarity with the sources and location of data enhanced its collection, made it more comprehensive and thereby improved the understanding of the case study.

Summary of the Chapter

This chapter has provided an overview of the research methodology that was followed throughout this study. The chapter commences with a description of the study's conceptual framework, which consists of a metasystem and an external environment. The metasystem is comprised of three focal organizations - the City of Edmonton and the two school districts, as well as of groups and individuals within the City of Edmonton. All are involved in activities associated with maximizing

community use of public facilities (the metasystem goal). The external environment consists of the general and the task environments.

The second section outlines the methodological framework chosen for this study - a qualitative case study. This study was not designed to test or verify hypotheses but rather to gain insight into and understanding of issues associated with the development and operation of a metasystem during the ten-year period between 1970 and 1980. The discussion of qualitative research methodology and the historical organizational case study reflects upon their appropriateness to the study.

The final section of this chapter addresses the research strategies and procedures employed in this study. It describes the choice made to carry out an intensive analysis of a narrower scope rather than a more superficial examination of a broader set of issues which was part of the original design. The data collection strategy focused on interviews and historical organizational documents. The data was analyzed during the collection stage and subsequent to it. Finally, the issue of trustworthiness in qualitative research is presented and the measures undertaken in this study to enhance the validity and reliability of the data and the findings are outlined.

CHAPTER 4

THE SETTING FOR THE CASE STUDY

Introduction

The purpose of this chapter is to provide background information on the setting in which the study took place. The case study focuses on an agreement among three organizations providing services to the community in the City of Edmonton. A review of the setting for the case study was deemed necessary for a number of reasons. City population and school enrollment trends during the 1970's were considered important background information as influence of an organization within a metasystem is assumed to be related to growth or decline of the organization. Secondly, the provision of social and recreational services to city residents was affected by the Joint Use Agreement and therefore the change in emphasis in the delivery of these services was considered important to this study and is reviewed below. Finally, the nature and source of legal authority and power provide an important element of background information that explains courses of action undertaken by the focal organizations in the metasystem. Interaction between independent or interdependent organizations in a conflict situation was expected to be different from such relations when one organization is subservient to the other.

The background information describes some of the city's characteristics including its location, population growth, and school

enrollment trends. Special emphasis is placed on the study period between 1970 and 1980. The role of selected organizations involved in community development which took part in various activities associated with the agreement is also presented. Finally, the nature and source of power granted to the focal organizations, City Council and the two school boards, is reviewed.

The City of Edmonton - Growth Prior to the Study Period

Edmonton is located near the eastern slopes of the Rocky Mountains on the banks of the North Saskatchewan River. It became a city in 1904 and a year later the capital of the new province of Alberta. The city's population fluctuated during the first half of the century until the discovery of oil in 1947 and the subsequent discoveries of natural gas and additional oil fields. The surge in economic activity in the petroleum industry stimulated rapid population growth.

The City of Edmonton plays a dominant role in the region's economy. It serves as a market centre as well as a supplier of goods and services for the entire region. The Edmonton metropolitan area differs markedly from metropolitan areas such as Toronto, Winnipeg or Vancouver in that a relatively high proportion of the Edmonton metropolitan population resides within the boundaries of the city proper. During the study period, between 1970 and 1980, the residents of the City of Edmonton formed about 80% of the region's population.

The city's population growth and enrollment trends for the years 1960 to 1985 are summarized in Table 4.1. Figure 4.1 illustrates the city's population growth during the period 1881 to 1967 with population projections to the year 2001. Three projections are made: low, medium

Table 4.1

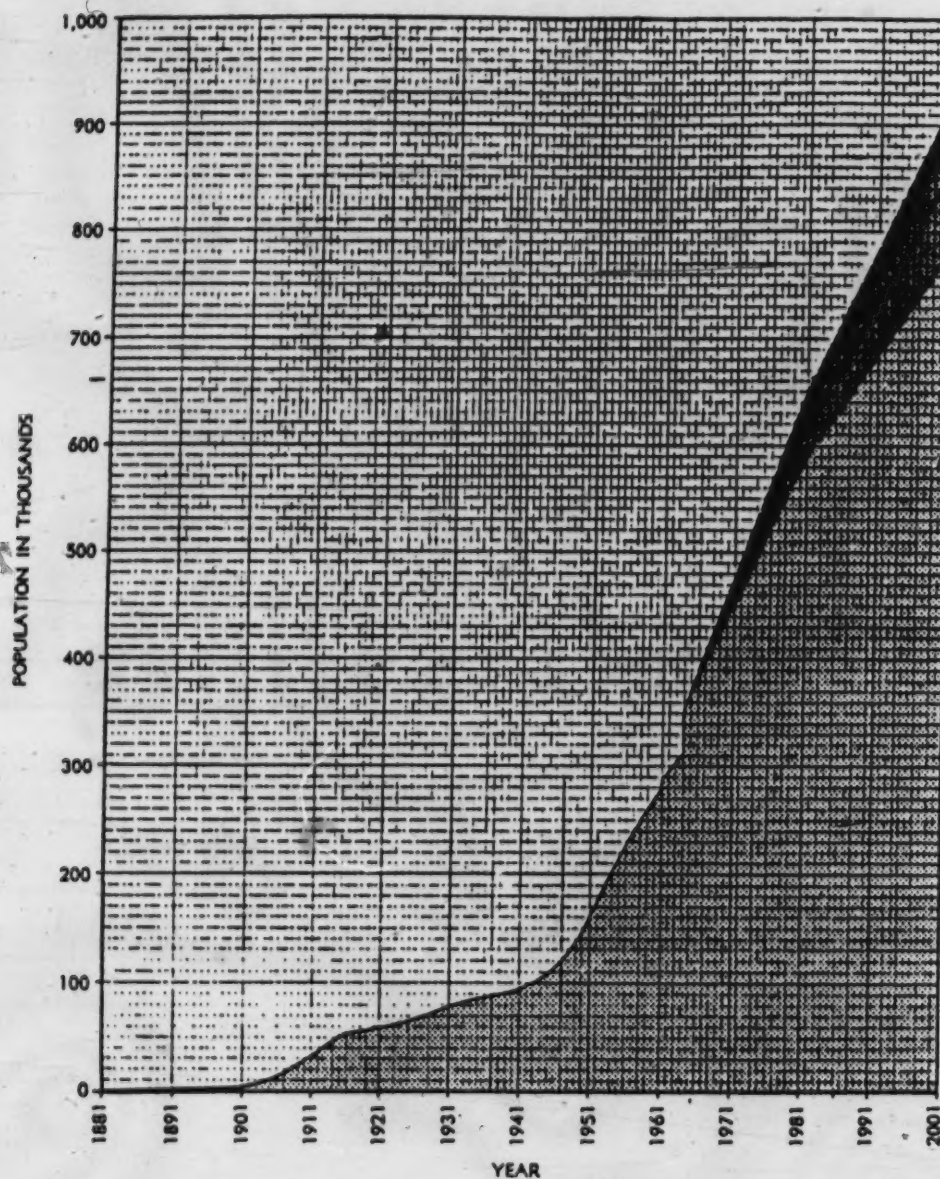
Population and Enrollment Trends within the City of Edmonton 1960-1985

Year	City popula- tion	% Annual Change	Public Schools	% Annual Change	Separate Schools	% Annual Change	Public and Separate Schools	% Annual Change
1960	269,314		43,488		13,067		56,555	
1961	276,018	+ 2.5	46,120	+ 6.1	14,257	+ 9.1	60,377	+ 6.8
1962	294,967	+ 6.9	49,426	+ 7.2	16,165	+13.4	65,591	+ 8.6
1963	303,756	+ 3.0	51,353	+ 3.9	17,531	+ 8.5	68,884	+ 5.0
1964	311,804	+ 2.6	62,019	+20.8	21,867	+24.7	83,886	+21.8
1965	371,265	+19.1	64,541	+ 4.1	23,572	+ 7.8	88,113	+ 5.0
1966	381,230	+ 2.7	67,036	+ 3.9	25,702	+ 9.0	92,738	+ 5.2
1967	393,563	+ 3.2	68,973	+ 2.9	27,706	+ 7.8	96,679	+ 4.2
1968	410,105	+ 4.2	71,827	+ 4.1	29,299	+ 5.7	101,126	+ 4.6
1969	422,418	+ 3.0	73,787	+ 2.7	30,365	+ 3.6	104,152	+ 3.0
1970	429,750	+ 1.7	76,606	+ 3.8	31,160	+ 2.6	107,766	+ 3.5
1971	436,264	+ 1.5	75,140	- 1.9	31,302	+ 0.5	106,442	- 1.2
1972	441,530	+ 1.2	72,997	- 2.9	31,521	+ 0.7	104,518	- 1.8
1973	442,365	+ 0.2	72,857	- 0.2	31,596	+ 0.2	104,453	- 0.1
1974	445,691	+ 0.8	72,908	+ 0.1	31,464	- 0.4	104,372	- 0.1
1975	451,635	+ 1.3	72,748	- 0.2	30,958	- 2.6	103,706	- 0.6
1976	461,559	+ 2.2	71,052	- 2.3	30,322	- 2.1	101,374	- 2.2
1977	471,474	+ 2.1	68,814	- 3.1	29,494	- 2.7	98,308	- 3.0
1978	478,066	+ 1.4	67,003	- 2.6	28,876	- 2.1	95,879	- 2.5
1979	491,359	+ 2.8	65,327	- 2.5	28,367	- 1.8	93,694	- 2.3
1980	505,773	+ 2.9	65,409	+ 0.1	28,018	- 1.2	93,427	- 0.3

TABLE 4.1
(continued)

Year	City popula- tion	% Annual Change	Public Schools	% Annual Change	Separate Schools	% Annual Change	Public and Separate Schools	% Annual Change
1981	521,205	+ 3.1	65,784	+ 0.6	27,864	- 0.5	93,648	+ 0.2
1982	551,314	+ 5.8	68,834	+ 4.6	27,867	0	96,701	+ 3.3
1983	560,085	+ 1.6	69,042	+ 0.3	27,242	- 2.2	96,284	- 0.4
1984	No Census		68,905	- 0.2	26,929	- 1.1	95,834	- 0.5
1985	No Census		69,750	+ 1.2	26,667	- 1.0	96,417	+ 0.6

FIGURE 4-1



Actual and Projected Population in the City of Edmonton 1881-2001

Source: The City of Edmonton General Plan, August 1967, p.3.5

and high rates of growth. Growth reflects not only the net interprovincial mobility, immigration and birth and death rates but also changes in the city's boundaries. Throughout the years, the city expanded and annexed adjacent communities which resulted in major increases in population (e.g., 1964). It is noteworthy that the 1967 population projections for the year 1986 were 635,000 and 720,000 people under the low and high growth rates respectively. The civic census for April 1, 1986 revealed a population of 571,506.

The Study Period 1970-1980

At the commencement of the study period, the city population was 429,750 and combined enrollment in the two school jurisdictions reached a peak of 107,766 students. One out of every four residents in the City of Edmonton attended school in the public or the separate (Catholic) school district. During the 1970's, the City further expanded its area and its population continued to grow. On January 1, 1970, city boundaries enclosed 56,179 acres (87.75 square miles), and on January 1, 1980, 84,666 acres or 127.8 square miles (a 50.7% increase) were under the city's jurisdiction. The City of Edmonton experienced a significant population increase during the 1970's (14.1%) and the total population rose to over half a million in 1980. At the same time, the total school population declined by 14,333 students (13.3%) to 93,427 and the ratio of school enrollment to total population dropped from one in four in 1970 to one in 5.4 in 1980.

The Federal census provides another source of information relative to this trend. Comparing 1971 and 1981 census information reveals that the city population grew by 21.5% from 438,150 to 532,246 at the same time

the number of individuals under 15 years of age declined from 130,400 in 1971 to 108,385 in 1981 (16.9%). It is worth noting that figures used in the Federal Census do not correspond with those derived by the City since they are taken in a different month of the year and different methods are used to collect the data.

A report produced by the city's Corporate Policy Planning Department entitled Edmonton Statistical Review 1973-1978 relates the decline in school population to the utilization of school facilities. The report states that:

Due to continuously declining school enrollments, the utilization rate of school buildings, as defined by the actual number of students as a percentage of operational capacity, remains relatively low. For example, during the school year 1977-78, only 77.7% of the total capacity in the public school system and 82.2% of the total capacity in the separate school system was used. (Edmonton Statistical Review 1973-1978, 1979, p.129)

As in many growing communities across North America, there has been a major population shift to the suburbs of the city. Large scale suburban growth commenced in the early 1970's and the common phenomenon of not having enough school facilities where the children reside and not having enough students where schools are located prevailed also in Edmonton.

The Edmonton Statistical Review 1973-78 provides data which describe some characteristics associated with an economic boom such as that experienced by Edmonton during the 1970's.

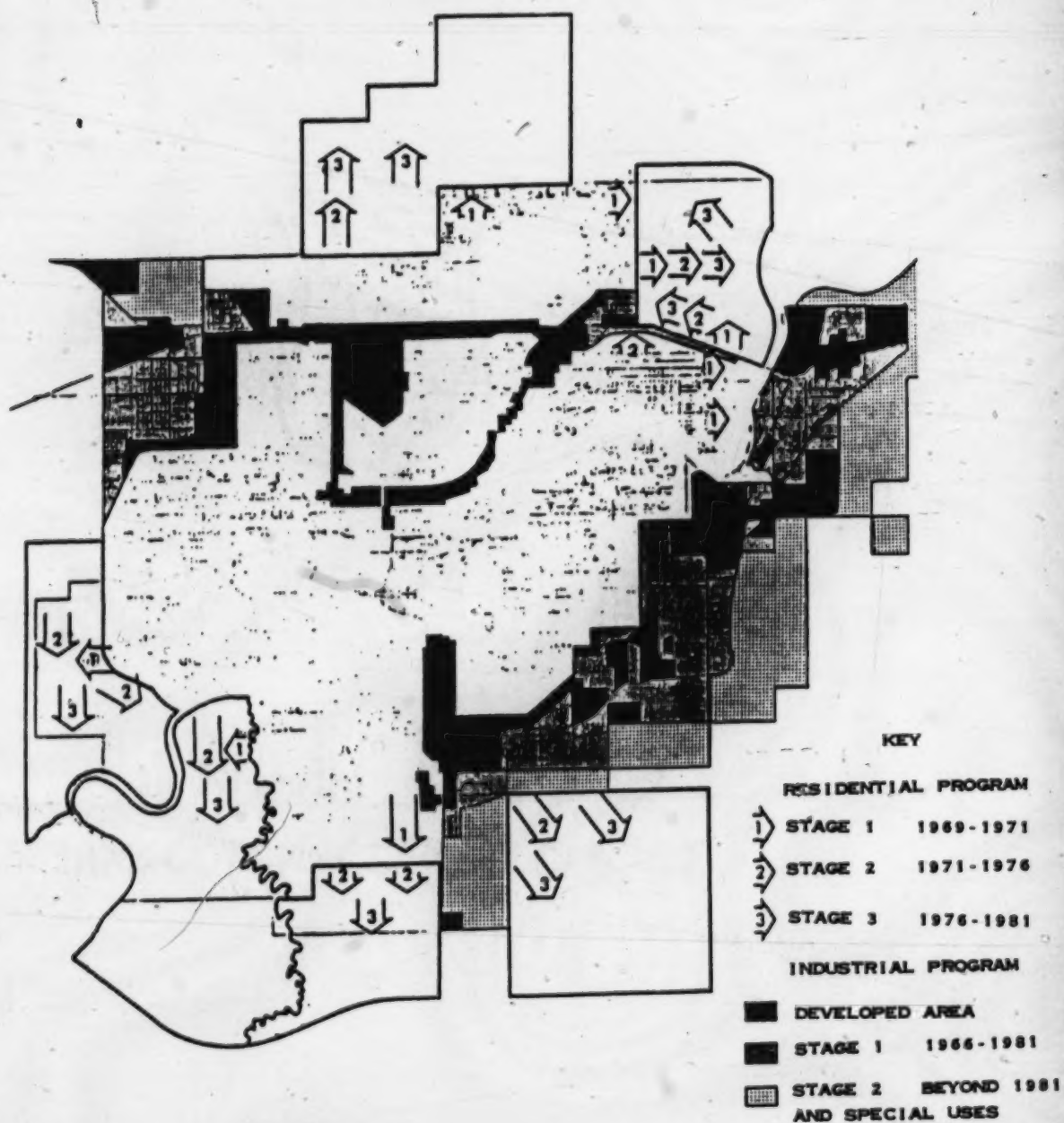
1. The average yearly increase in total operating expenditures for municipal services was 20.1% for the period 1973-1978.
2. The value of residential building permits increased from about 77 million dollars in 1973 to 460 million dollars in 1978.

3. The number of daycare placements almost doubled during the five year period, from 2,656 in 1973 to 5,148 in 1978. This occurred despite the overall decline in the number of children under 15 in the city.

4. The average number of persons per household and the average family size declined.

Prior to 1970, new developments were largely a piecemeal addition of small areas to the edge of the developed part of the city. The rapid growth in the late 1960's and the early 1970's, required a new approach to land development. The concepts of Outline and Area Structure Plans (involving large areas of land) were introduced in order to ensure orderly growth, sufficient serviced land and sufficient utilization of major facilities and services. An indication of the expected growth is presented in the City of Edmonton General Plan prepared by the City's Planning Department in the late 1960's. The plan estimated that, during the period 1969-1981, the city's population would increase by about 200,000 residents and that two-thirds of the growth would be accommodated in new outline plan areas. It was also expected that the share of multi-family units would be higher in these areas in comparison with existing neighbourhood composition and that, as a result, the population density would increase. The City of Edmonton became heavily involved in land development in the suburban areas. In addition to providing the basic services to the land and co-ordinating development agreements, it marketed serviced lots to the public. Its General Plan identified a Staging Plan (Figure 4.2) which was designed to promote an orderly and compact expansion during the period 1969-1981.

FIGURE 4.2



Staging Residential Development in the City of Edmonton 1969-1981

Source: The City of Edmonton General Plan, August 1967, p.14.2

The Social Side of Growth

The city's rapid growth brought about social problems that had to be addressed. The scope of activities of the Edmonton Social Planning Council, a citizens' organization which acted as a resource centre for community groups requesting planning help for social action projects, provides some insights into social problems which were part of the growing community. Soderstrom (1980), in his dissertation entitled Edmonton Social Planning Council: An Analysis 1928-75, indicated that the Council was involved in setting up in the core part of the city the Boyle Street Information Centre and the Boyle Street Community Services Cooperative. It supported homeless and transient women in overnight shelters, encouraged the development of housing cooperatives, assisted convicts released from jail and helped unemployed transients in securing employment. Another initiative was in the development of proposals for housing projects for handicapped people.

With the appointment of a new Acting Executive Director in 1970, the Council assumed a different role. It abandoned its original role of planning and co-ordinating the functions of health and social service agencies and became a community development organization. In its new role as an agent for social change and development, it became involved in a variety of projects related to community use of school facilities, thus affecting the Joint Use Agreement.

The Council's new role was described in a document produced in 1972 which stated:

An objective of the organization is to develop and maintain a voluntary non-governmental capacity for informed decision making and action ... The Council provides resources to initiate and also to support efforts through which citizen plans can be developed and implemented. (Edmonton Social

Planning Council, Objects: Edmonton Social Planning Council, 1972, p.1)

This organization, which received funds from the City of Edmonton as well as from the United Way (an organization coordinating the distribution of fund raising within the community), identified in 1975 four areas of focus: Participatory democracy (e.g., access to information), decent standard of living (e.g., eliminate poverty), humane social controls (e.g., treatment of criminal offenders, drug addicts, alcoholics) and humane urban environment (e.g., urban transportation, pollution).

The Social Planning Council supported improved representation of the interests of residents on City Council and advocated a ward system for civic elections. Prior to 1971, city aldermen were elected from the population at large. Following a plebescite in 1968, in which 61.64% of the voters supported a ward system, City Council passed a bylaw in 1970 which divided the city into four wards with three aldermen elected from each. The ward system was narrowly approved for a second time in a 1974 plebescite (53.3%). It is worth noting that in a referendum undertaken during the same election year, the public also narrowly rejected the proposal that would have allowed the consumption and sale of alcohol in schools.

The issue of the ward system was again brought to the fore a few years later when the 1970 president of the Social Planning Council became an alderman. She supported a larger number of wards and argued that the existing ones were so diverse that aldermen could not represent the particular interests of their constituency. In time for the 1980 election, City Council approved a system based on six wards with two aldermen elected from each.

The views presented by the Social Planning Council and by others in the City's Parks and Recreation and Social Services Departments reflected demands for increased local participation in decision making. This approach was reflected in such examples as the experimental project which attempted to co-ordinate and integrate the delivery of human services at the local level and which advocated the provision of decision-making powers to community councils over the use of schools after school hours. These views were at odds with those of some sections of the public, and its representatives in such places as school boards, which were more "conservative" in their opinions.

Recreational Services

The City of Edmonton Parks and Recreation Department has maintained a goal of ensuring the citizens of Edmonton have opportunities for personal growth in their leisure time, thereby enriching the life of individuals and the community. Towards this goal, the Department has developed parks and recreation facilities to serve the expressed needs of the community and has encouraged the provision of recreational opportunities by community leagues, sports groups and other community organizations. The City, through its Parks and Recreation Department, has been providing community leagues and community groups with advisory and consultative services, publicity, planning and research, leadership development and program development.

Community leagues as voluntary organizations have been providing recreation services to the community. Their contribution was further enhanced when in 1921, the individual community leagues in the City of Edmonton formed the Federation of Community Leagues in order to assist,

co-ordinate and liaise between the leagues and the civic administration. With the development of new suburbs in the 1970's, many new community leagues were established while others, in the older parts of the city, became inactive. An ongoing agreement exists between the City and the community leagues, whereby the community leagues lease public parkland from the City of Edmonton for their buildings and facilities, and plan and develop their recreational activities in co-operation with the Federation of Community Leagues and the Parks and Recreation Department. In addition to leasing the land and assisting in the planning and design of facilities, the City provides grants for construction and operation of the facilities.

In the 1970's, an emphasis was placed on community involvement in the provision of recreational services. The President's Manual of the Federation of Community Leagues, which was written in the 1970's (page C10-1) suggested that:

Recognizing both the importance of community involvement and that funds for public recreational services are limited, municipalities have started to direct funds towards assisting community groups rather than to direct programme services. By mobilizing and co-ordinating available community resources, the delivery of recreational services can be expanded.

The relations between the City, the Federation and the individual community leagues has been very close. The Parks and Recreation Department has represented the Federation's interests to other city departments. In view of its relatively large membership, the Federation has been considered to be very influential in civic elections, and city administration pays special attention to the Federation needs. Prior to the approval of the Joint Use Agreement, the Federation urged the City to defer any decision on the proposed draft and give the Federation the opportunity to review the document and provide input since the agreement

was significant to the provision of recreational services to the community. Its wish was granted and some revisions were proposed by the City to reflect the desires of the Federation of Community Leagues.

The Authority and Power of the Metasystem's Focal Organizations

The three parties to the Joint Use Agreement are the City of Edmonton and the two school jurisdictions: the Public and Separate school districts. In the following section, references will be made to the power delegated to these organizations, its limitations, and the source of each organization's authority.

A federal system of government, as it operates in Canada, implies an aggregation of provincial governing units, each exercising its own separate powers apart from those which are in the hands of the central or federal government. The British North America Act of 1867 identifies the distribution of power between the federal and the provincial governments. Section 92(8) states that in each province the legislature may exclusively make laws in relation to municipal institutions in the province. The provincial powers over education, identified in Section 93 of the British North America Act, indicate that each provincial legislature may exclusively make laws in relation to education, provided it does not prejudicially affect any right or privilege with respect to denominational schools of the Protestant or Roman Catholic minority (Dawson, 1963).

Since education is under provincial jurisdiction, the board of trustees in a public school district in the province of Alberta is a creation of the provincial government. The Minister of Education can create or dissolve a school district and thereby the board of the

district. Section 13 of the School Act, dealing with the establishment of a public school district, states that:

- 13(1) The Minister may establish any portion of Alberta as a public school district.
- (2) The order establishing a public school district shall describe the boundaries of the district and give it a name and number in the following form: "The . . . School District No"

(School Act, 1980)

Section 24 of the School Act deals with dissolution of school districts. It provides that:

- 24 The Minister may declare that any district or division be dissolved and thereupon the board is dissolved and ceases to have any of the rights, powers and privileges vested in it by this or any other Act and the district or division ceases to exist.

(School Act, 1980)

The School Act mandates certain actions ("The Board shall ..."). A school district for example, must accept in its schools every pupil whose parents reside in the district. It also is required to provide and maintain adequate real and personal property for its administrative and educational purposes. On the other hand, the School Act provides discretionary powers to boards ("The Board may ..."). A board of a city district may provide for the holding of an annual meeting of the electors for the discussion of board affairs. There are other discretionary actions which require the prior approval of the Minister of Education. For example, a board may enter into an agreement with other boards or municipalities for the joint ownership, control, operation or use of public buildings subject to the prior approval of the Minister. Similar requirements are in place when the board acquires land for school buildings or decides to close a school.

The provision for the establishment of a separate school district is detailed in section 52 of the School Act. It states that:

- 52(1) The minority of electors in any district, whether Protestant or Roman Catholic, may establish a separate school in that district, and in that case the electors establishing a Protestant or Roman Catholic separate school are liable only to assessments of the rates they impose on themselves in respect of that school, and any person who is legally assessed or assessable for a public school in the district is not liable to assessment for any separate school in it.

(School Act, 1980)

While the minority of electors in any district, whether Protestant or Roman Catholic may establish a separate school, they must follow detailed procedures in the process of establishing support for a separate district. Detailed procedures are also mandated for dissolution of a separate school district.

If the electors mentioned in Section 52(1) vote in favour of establishing a separate district, the Minister is obligated to respect their wishes (School Act, Section 53(1)). The authority and powers of a separate school are referred to in Section 57.

- 57 A separate school district and its board shall possess and exercise all the rights, powers and privileges of, and are subject to the same duties and liabilities and shall have the same method of government as a public school district and its board.

(School Act, 1980)

It should be noted that all the sections from the current School Act and the Municipal Government Act referred to in this discussion were in effect in the 1970's, although under different section numbers.

The government of the province of Alberta, having responsibility for municipal institutions in the province, stipulates municipal powers and duties in the Municipal Government Act. Although the Minister of

Municipal Affairs is responsible for the administration of this Act, it is the Lieutenant Governor in Council who, by order, may form or dissolve a municipality (see Sections 13 and 17 respectively).

As with the School Act, the Municipal Government Act mandates certain requirements such as the existence of a council in every municipality (Section 26) and provides municipalities with discretionary powers such as Section 213 pertaining to recreation and community services. This section which is related to the Joint Use Agreement, states that:

213(1) A council may pass by-laws respecting all matters pertaining to the acquisition, establishment, construction, control and operation of parks, trailer courts, mobile home parks, camp grounds, athletic grounds and exhibition grounds, including provision for the acquisition, construction and control of structures, equipment, machinery and fittings that may be necessarily required.

213(2) Without restricting the generality of subsection (1), a council may pass by-laws:

- (a) establishing and maintaining swimming pools and granting aid towards the establishment and maintenance of swimming pools;
- (b) establishing and maintaining or granting money to aid in the construction of public bathing houses;
- (c) acquiring or erecting and operating municipal skating rinks or making grants in aid of the erection or of the maintenance and operation of skating rinks or baths;
- (d) acquiring, maintaining and operating municipal golf courses;
- (e) making grants in aid to playground associations;
- (f) making grants to community associations and community leagues that are providing recreation and community services to residents.

213(3) A council may impose special taxes for all purposes set out in this section and may provide for the charging of admissions or the raising of funds as the council may decide.

The perusal of the two acts leaves the impression that cities have significantly more discretionary powers in comparison with the school boards which are required to receive ministerial approval prior to a much wider range of desired activities.

Finally, the City of Edmonton is the local property tax authority which collects property taxes to support both municipal and educational services. As the school boards determine the amount of the required local taxes, the city, which must collect the taxes, has no control over the amount requisitioned for educational purposes. This situation has been a source of conflict in the past. City aldermen claimed that the city was blamed by residents for tax increases over which it has no control. Considering that separate tax collection efforts would be inefficient and would result in unnecessary expenditures, it was decided to clearly identify in the tax notice the tax level for education. About 50% of the property taxes collected by the city are transferred to the two school boards. For a number of years now, the local property tax has supplied an increasing share of the education budget. This share gradually increased from about 10% of the school boards' total expenditures in the early 1970's to more than one-third in 1985.

Summary of the Chapter

A number of generalizations arising from this review of the setting are relevant to the purposes of the present study. Among them are the following:

1. During the study period (1970-1980), the City population increased while the number of students served by the two school districts declined.

2. Between 1970 and 1980, the City annexed a significant amount of land which increased the territory under its jurisdiction by over 50%. The City became heavily involved in servicing land, negotiating with developers and marketing lots.

3. The City's rapid growth brought about social problems that had to be addressed.

4. The changing community needs and expectations were reflected in a revised role for the Edmonton Social Planning Council. This citizen's organization abandoned its role as a co-ordinator of health and social services agencies and became a social animator, stimulating and acting as a catalyst in the development of the community.

5. Cities and school districts are the creation of provincial legislation. The province delegates some authority to the local level but maintains the power to establish or dissolve locally elected school boards and city councils.

6. The desire to decentralize decision-making and improve local services to reduce red tape and provide better representation of individual and group interests was part of Edmonton's social and recreational scenes in the late 1960's and the early 1970's.

CHAPTER 5

JOINT USE AGREEMENT - EVOLUTION AND DIMENSIONS OF INTERORGANIZATIONAL RELATIONS

Introduction

Chapter 5 commences the reporting of the findings of the case study. Following the literature review and the methodology, discussion focuses on two major themes: the evolution of the metasystem and the problems associated with it (Van de Ven, 1976) and the dimensions of the interorganizational linkages among the focal organizations in the metasystem (Marrett, 1971).

The first part examines the evolution of the Joint Use Agreement from the initial version of the 1959 agreement to the latest agreement signed in 1980. Because the study focuses on the period 1970-1980, different perspectives on the issues and problems pertaining to this period are highlighted. The second part focuses on key dimensions of interorganizational linkages. Consistent with Marrett's (1971) study and the subsequent application of the dimensions she proposed in studies by Andrews (1978) and Mutema (1981), this study concentrates on the formalization of the agreement and the intensity and reciprocity associated with its implementation.

Within this overall framework, five of the study's sub-problems are addressed. There is a review of the problems which contributed to the renegotiation of the Joint Use Agreement in the early 1970's (sub-problem 3) and of the changes incorporated into the new agreement to reflect the

concerns of those that demanded the review (sub-problem 6). Dimensions of interorganizational relations discussed include the formalization of relations (sub-problem 1) and an examination of the nature, intensity and reciprocity of the exchange (sub-problem 2). The operation of the Joint Planning Committee during the 1970's is the fifth sub-problem addressed in this chapter (sub-problem 7).

Evolution of Joint Use Agreements in Edmonton

The first formal joint use agreement between the City of Edmonton and the Edmonton Public School Board was signed in 1959 and involved the development and operation of senior high school sites. The sites included the Public School Board's own property and the adjacent athletic grounds. In some cases, a fence divided the site along an ownership line and separate maintenance crews worked in their respective portion of the property. There was little co-ordination between the parties, and even where fences were not erected there was a visible maintenance line since crews mowed the lawn on different days and left the grass at different heights.

The agreement which focused on senior high sites stated that the parties agreed that land for active recreational purposes should be held and developed jointly by the City and the Public School Board. The latter would purchase and hold title to the portion of the senior high site including the buildings and the land immediately adjacent to them, while the City and the Board would hold joint title to the rest of the site and both parties would share the cost of development, maintenance and acquisition of that portion of the site.

This agreement established a Joint Planning Committee and identified the representatives, which consisted of the Superintendents of Parks and Recreation (separate departments at that time), and the School Board's Deputy Superintendent. This Committee had the duties of: (a) assisting in planning the sites; (b) developing policies with regard to the sites, and (c) assisting in scheduling the use of the sites. In terms of the operation on the site, the School Board had access and was responsible for the activities during day-time (6:00 A.M. to 6:00 P.M.) on each school day and the City of Edmonton, through the Parks and Recreation Departments, had the jurisdiction, control and use of the site during the evening and on the week-ends.

It is interesting to note that, while a clause referring to a future review of the agreement was included, there were no conditions pertaining to its possible termination. A thirty-day notice in writing was required to request a review by the other party and this could come into effect a minimum of one year following the signing of the agreement and at least one year following any previous notice.

The second format agreement between the City of Edmonton and the Edmonton Public School Board was signed in 1962. It extended the co-operation of the two parties beyond the senior high sites to include all school sites and, in addition, provided a base for the incorporation of community needs into school design and the sharing of additional costs resulting from the recreational use of schools by the community.

Until the 1960's neighbourhood schools and park sites were planned independently and, in many cases, located on different sites in the neighbourhood. The sites purchased by the Board and the neighbourhood parks were relatively small, and places where community team sports such

as soccer or baseball could be played were limited. Both parties recognized the advantages of a joint site and declared that, wherever possible, elementary and junior high school grounds should be acquired and located immediately adjacent to parkland and that these school sites should be developed for both school and public recreational use. They further agreed that the cost of developing and maintaining these sites should be shared. There was a general belief that such co-operative effort would encourage (a) better provision of school and public recreational facilities; (b) adequate use of school grounds by the general public, and (c) a more effective use of land, planning of the grounds and maintenance of the sites.

The highlights of the 1962 agreement were:

1. The City of Edmonton, through Parks and Recreation, was responsible for total site planning and design where the site included both City and Board properties. (Arrangements could also be made for the City to undertake responsibility for the planning and design of sites entirely owned by the Board.)

2. Costs of site development were to be shared on a pro-rated acreage basis. The School Board was responsible for the costs of site development, on land adjacent to the buildings (e.g., ornamental front parking lots) as well as for maintenance of such items as hard surface areas, all buildings, fences, goal posts and snow removal.

3. The City would pay for additional costs for provision of facilities of different standard than those maintained by the Board.

4. All future school design must meet the needs of community recreation centres, neighbourhood leagues and community and city-wide

recreation programs, and must provide for a more extensive and economical use of schools by the general public.

5. The extra costs associated with the new school design and the additional expenditures on maintenance resulting from community recreational use made of school buildings were to be shared by the City and the neighbourhood leagues on a basis agreed upon by City Commissioners and the Board.

The 1959 and the 1962 agreements were between the City of Edmonton and the Edmonton Public School Board. The spirit of co-operation was extended with the signing of a new agreement in 1966 to include a third party - the Edmonton Roman Catholic Separate School District. This agreement established a Joint Planning Committee which was not mentioned in the 1962 document. The Committee consisted of two officials appointed by the respective Superintendents of the City Parks and Recreation Department and the Edmonton Public and the Edmonton Separate School Boards. The identified responsibilities of the Committee were two-fold: (a) an operational duty of implementing the terms of the agreement and co-ordinating matters related to it, and (b) policy-related work recommending policies and developing regulations with regard to the use of facilities, buildings and sites.

The 1966 agreement introduced an exchange in which the school boards would construct, operate and maintain school buildings and facilities and make them available free of charge for public recreation programs which were city-operated or city-sponsored, and for approved volunteer, non-profit associations, clubs or groups. In return, the City of Edmonton through Parks and Recreation would construct, operate and maintain parks

and recreation areas, buildings and facilities and make them available for the school boards' programs free of charge.

The issue of enhancing community use of schools which first appeared in the 1962 agreement, was emphasized in the 1966 agreement as well. The agreement stated that,

. . . in planning school buildings the Board shall provide for maximum community use and the City shall pay the cost of these portions on new buildings and additions to existing buildings which provide for specific City recreational purposes as approved by the parties hereto. (Joint Use Agreement, 1966, p.4)

This point was a source of controversy in the early 1970's when the Public Board decided to pay for a community wing attached to a school in order to hold title and enforce board policy which prohibited the consumption of alcoholic beverages and playing of games of chance (bingo) on board property.

Issues related to the ownership of land in general followed the provisions of the 1959 agreement regarding senior high school sites and extended the 1962 agreement that addressed the issue of locating parkland adjacent to elementary and junior high sites. The reference to land ownership in the 1966 agreement specified that:

1. The Boards purchase and hold title to senior high school grounds upon which school buildings are located together with the area immediately adjacent to the buildings. The grounds required by athletics and public recreational purposes will be held jointly by the City and the Boards.

2. The Boards purchase and hold title to land required for buildings and for school sports and athletics in elementary and junior high school sites.

3. The City purchases and hold title to all land required for public park and recreation purposes and wherever possible such property be located next to an elementary and junior high school site.

For the first time, reference was made to a follow-up on the reciprocity of the agreement. The agreement mandated that records of costs and programs were to be kept by each party to provide data for a review of the agreement.

Relative to the continuation and future reviews of the agreement it was stated that:

This agreement shall be in effect for a period of one year from January 1, 1966 provided that at the end of six (6) months any of the parties may request a review and revision of the Agreement. Thereafter, this Agreement shall continue in effect from year to year unless any of the parties gives thirty (30) days notice in writing to the other parties requiring a review of this Agreement. (Joint Use Agreement, 1966, p.4)

The Agreements signed in 1959, 1962 and 1966 did not receive approval from the Minister of Education in accordance with the requirements of the School Act, and although the agreement worked well for the parties involved, it was necessary to sign a new agreement in 1970. It was suggested that the 1966 Agreement was "defective for debenture borrowing purposes since the said Agreement prior to execution, did not receive the prior assent of the Minister of Education as is required by Section 92 of the School Act" (Joint Use Agreement, 1970, p.2).

The 1970 Agreement seems to reflect a protective stance of the school boards in which their vested interests became the predominant factor. It omitted the recognition that (a) maximum use of land and facilities should result in the most economical provision of school and public recreation facilities and programs, and (b) that the parties believed that the gross cost of providing school and recreation facilities and

programs would remain similar to the present costs under existing programs and conditions. On the other hand, the Agreement clarified in some instances the city's responsibility for grounds maintenance. It stated that fences, goal posts and similar sports structures on school grounds were the city's responsibility. This had been a point of contention between the Boards and the City's Parks and Recreation Department.

Finally, the 1970 Agreement was more of a "gentlemen's agreement", with wide-ranging flexibility and the parties not being bound by its terms for an extensive period of time. With reference to the termination of the Agreement, it was stated that:

This Agreement shall remain in force (after approval by the Minister of Education) from the date of its execution by the parties until it is amended or terminated. If amendment or termination is proposed, each party to this Agreement shall be given at least thirty (30) days prior notice of such intention. (Joint Use Agreement, 1970, p.5)

Summary

The first Joint Use Agreement was between the Edmonton Public School Board and the City of Edmonton and was signed in 1959. It involved the development and operation of senior high school grounds. Subsequent agreements were signed in 1962, 1966, 1970 and 1980. They expanded to include the separate school district and broadened in scope to include the acquisition, development, maintenance and utilization of all schools and parkland. The agreements have been referred to as "gentlemen's agreements." They are not prescriptive and tend to reflect a protectiveness of the organizations' vested interests. Each organization has its own regulations with regard to access to its facilities and there

has been a clause which enables termination of the agreement with relatively short notice.

Perceived Problems with the Joint Use Agreement in the 1970's

The early 1970's were turbulent years for co-operative efforts between the City's Parks and Recreation Department and the Public School District. The Separate School District played a limited role in the conflicts. At the level of elected officials there were serious disagreements regarding the role the Board should play in enhancing community use of schools. The Board was reluctant to spend educational dollars on community-related activities and insisted on control of activities held on school property. The Separate Board supported this stand on cost increases but was perceived as being more flexible in making schools available for community use (e.g., allowed consumption of alcohol at community functions). The City, on the other hand, perceived maximization of community use of schools, including summer use, as part of the Board commitment under the agreement and supported local communities in their attempts to gain control over the use of schools after school hours and during week-ends and holidays. These policy issues (which are further elaborated upon in the next chapter), together with a variety of operational difficulties, contributed to the desire among the elected officials to review the 1970 Joint Use Agreement.

It appears that an agreement as flexible as the one signed in 1970 did not serve the parties well during a period characterized by conflict since it did not include a clear and detailed definition of the respective responsibilities nor guarantee maximum access of the community to the school facilities. There had been continuing calls for the

establishment of a more prescriptive agreement that would "guarantee" the desired results and include detailed regulations designed to avoid misinterpretations and guide the implementation of the agreement. It is interesting to note that only a few years earlier the Superintendent of Parks and Recreation had praised the agreement in a letter to a Director of Community Services in Washington, D.C., stating that:

. . . the very fact that the Agreement is not too rigid and all parties concerned are sincerely convinced that this is a good arrangement permits flexibility when needed and provides for ready adjustments in our working arrangements as required. . . . Any agreement only works as well as the parties thereto make it work. (Letter from the Superintendent, Parks and Recreation, City of Edmonton, to the Director of Community Services, National Recreation and Parks Association, Washington, D.C., October 13, 1967)

The broad terms and extensive flexibility were ultimately perceived as a major problem with the Joint Use Agreement. The following section outlines some of the perceived problems associated with the 1970 Joint Use Agreement and its implementation.

The Nature of the Agreement

At the time of signing the 1966 Joint Use Agreement, broad statements were perceived to be sufficient and preferable since they enabled the Joint Planning Committee to deal with matters that needed interpretation or definition. The Agreement was designed to provide a large measure of flexibility and it worked well in the context of a joint spirit of cooperation at a time when the magnitude of problems facing the signatories was not as great as during the 1970's. During the turbulent period of the early 1970's, the clauses and terms of the Agreement were interpreted by the respective parties to suit their own interests (e.g., summer use of schools, responsibility for snow removal) and this resulted in tension

between and among the three organizations. An important factor which contributed to the desire to have a more "prescriptive" agreement was the change in personnel. The representatives of Parks and Recreation and the Public School Board on the Joint Planning Committee who had advocated flexibility in the late 1960's, and had worked out problems among themselves, were no longer in these positions following 1971.

Another concern with regard to the agreement was its scope. Conflicts arose in areas that were not covered by the agreement. The interorganizational co-operation was limited to the planning, development and maintenance of physical facilities and no reference was made to other areas such as the planning and operation of programs. Lack of co-operation resulted in the school boards' offering continuing education programs in conflict with Parks and Recreation programs.

Joint Planning Committee

A Joint Planning Committee was a product of the first Joint Use Agreement signed in 1959. This agreement identified the Superintendents of the Parks and Recreation Departments and the Public School Board's Deputy Superintendent of Schools as its members. The Committee's duty was to assist in planning and developing policy with regard to school sites and to assist in scheduling their use. The structure of the Joint Planning Committee was changed with the inclusion of the Separate School District as a party to the agreement in 1966. Section 3 of the 1966 agreement dealt with the establishment of the Joint Planning Committee. It stated the following:

- 3(1) That a Joint Planning Committee is hereby established and shall consist of two officials from each of:
The City Parks and Recreation Department,
The Edmonton Separate School Board, and

The Edmonton Public School Board
to be appointed by the respective Superintendents.

3(2) That the Joint Planning Committee shall be responsible to the City and the Boards in carrying out the following duties:

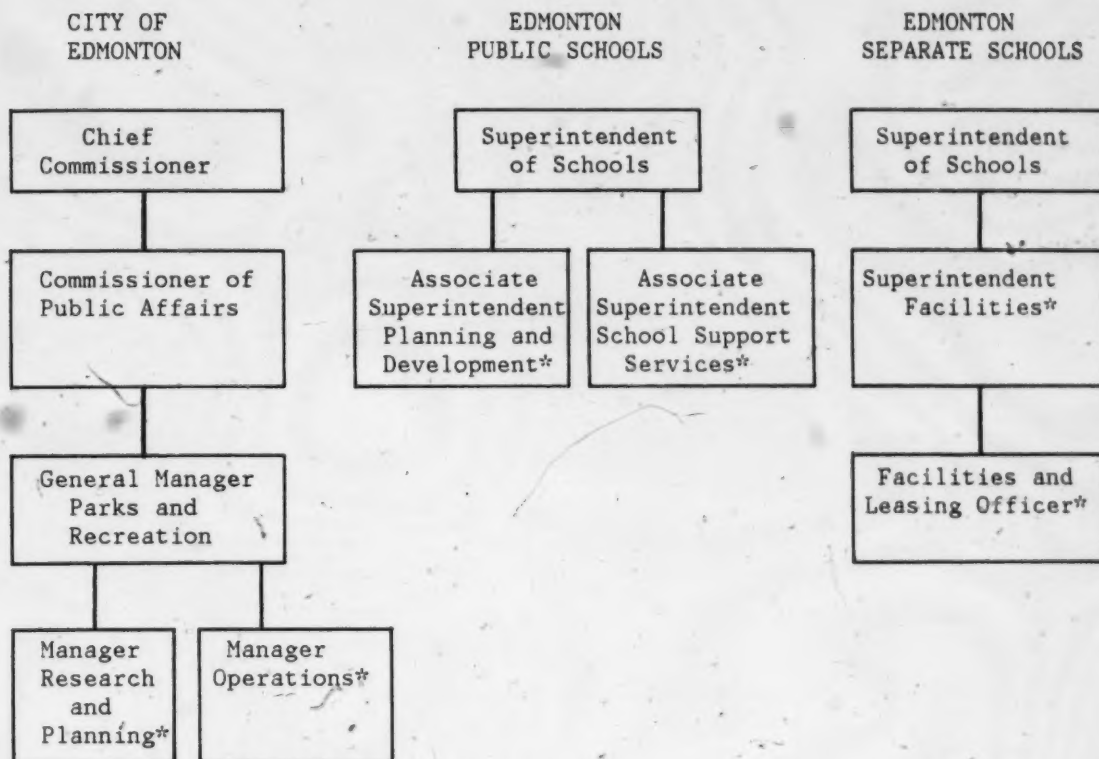
- (a) implementing the terms of this agreement and co-ordinating all matters related thereto,
- (b) recommending policies and developing regulations with regard to the use of facilities, both buildings and sites.

(Joint Use Agreement, 1966, pp.2-3)

The operation of the Committee and its membership were described in a letter dated October 13, 1967, from the Superintendent, Parks and Recreation to the Assistant to the Superintendent, Parks and Recreation, City of Calgary. He indicated that the membership on the committee consisted of the Acting Superintendent and the Deputy Secretary Treasurer of the Edmonton Public School District, the Superintendent and the Secretary Treasurer of the Separate School District, and the Assistant Superintendent of Parks and Recreation and the Director of Maintenance Division of the City. The significance of this letter does not lie in its description of what happened following the 1966 agreement, since such representation did not last very long, but rather in its illustration of the hierarchical variation in the positions held by the respective representatives. While the chief executive officers were listed as the representatives of the school boards, the city sent individuals who were two or three steps removed from the top administrator in the municipal bureaucracy. This pattern of representation continued when the Committee resumed its activities in the late 1970's following a number of years of inactivity. The imbalance that existed in the 1980 Joint Planning Committee is highlighted in Table 5.1. The impact of the imbalance was reflected not only in the practice of frequently sending substitutes but

Table 5.1

Joint Planning Committee Representation
in Relation to Organizational Hierarchy 1980



* Members of the Joint Planning Committee

in the topics and the nature of the discussions. A review of the minutes revealed that many of the items discussed were operational in nature rather than policy decisions. Parks and Recreation representatives were involved at the operational level and for them it was only natural to discuss concerns related to community access to schools including cancellations of community bookings, summer use of schools and one-caretaker schools. The Public School Board representatives, expecting the committee to deal with policy decisions, were represented at a high enough level so that they could commit their organization and not need to return to their superiors for direction. The committee's activities were described as "a battleground trying to solve problems in areas in which the members had no expertise." An interviewee who represented his organization on the Committee in the 1960's when a spirit of co-operation existed and the three individuals who represented their organizations were powerful and respected, suggested that in the early 1970's the Joint Planning Committee "fell into disuse and it was not held in high regard." There is other evidence to suggest that there was a growing dissatisfaction with the role of the Joint Planning Committee.

The Committee was not successful in reducing the tension among the parties and a review of the minutes of its meetings suggest that it was extensively involved in technical details rather than in providing direction for co-operation. An atmosphere of mistrust among its members can be illustrated through the following quote from the minutes of the Joint Planning Committee meeting of July 27, 1971 at which the issue of community use of schools during the summer months was discussed:

Attention was drawn to a letter from the Social Planning Council which was distributed to various sectors of the public,

and members of the Committee generally expressed dissatisfaction with this letter and its contents. The feeling was expressed that the letter constitutes an attempt to accomplish something by applying duress and that this is not a proper manner in which to attempt to accomplish our goals. The letter contained information which was from meetings which were not public meetings and this raises the question as to whether or not frank discussion could be held during Joint Planning Committee meetings if the possibility exists that such discussion will later be made public. (Joint Planning Committee, Meeting Minutes, August 25, 1971)

On the same issue of summer use of schools, Parks and Recreation's representative on the Joint Planning Committee wrote a letter to the Public School Board's Deputy Secretary-Treasurer stating that:

This department wishes to establish its strongest objection to unilateral decisions being made which affect other members of a tri-party agreement The Edmonton Public School Board Administration has consistently jeopardized the intent of the Agreement in respect to the use of schools during the summer holiday period and has consistently jeopardized the continuity of programs operated by this department and sponsored organizations by continual and extensive cancellation of programs during the fall and winter seasons.

At the same time, your Administration is making extensive demands for development, redevelopment and maintenance on school grounds and joint use areas and facilities.

It is our view, the Edmonton Public Board Administration is not prepared to co-operate within the terms of the Joint Planning Agreement. If this is the case, it should so advise the Board so that 30 days notice in writing may be given to the other parties to this agreement, requiring a review of the agreement. (Letter from Assistant Superintendent, Parks and Recreation, City of Edmonton to Deputy Secretary-Treasurer, Edmonton Public School Board, July 14, 1971)

This letter was discussed during a Public School Board meeting on September 14, 1971. There was a concern that the Board was being invited to withdraw from the agreement by an administrator at the Assistant Superintendent level when the Agreement was between the two Boards and the City of Edmonton. The issue of "protecting the money available to education" was raised, and in conclusion one trustee stated that:

It appears that the structure of the Joint Use Agreement is not facilitating anything and there appears to be room for misinterpretation It is time to develop a new kind of structure in respect to the Agreement as well as the Joint Planning Committee. (Edmonton Public School Board, Minutes, September 14, 1971)

Despite the call for a restructuring of the Committee, in the late 1970's following a number of years in which it was inactive and after the tension had eased, a similar committee was structured again. However, this time it was not responsible to the city and the Boards but rather acted in an advisory capacity to the superintendents.

Centralized versus Decentralized Approach

The various letters reviewed and paragraphs quoted in this chapter suggest that there were interpersonal conflicts among individuals representing the respective parties on issues associated with the Joint Use Agreement. This observation was confirmed by individuals interviewed during the data collection stage. The perception among individuals in Parks and Recreation was that "ex-military men" who strongly believed in centralized control and would do their utmost to protect and defend their territory were in control at the Public School Board. These "military men" insisted on tight supervision of school property and would rather see a gymnasium preserved for school use than have the floor and the equipment damaged by members of the local community. On the other hand, some members of the administration of the Parks and Recreation Department were perceived as being anti-bureaucracy and having "left-wing leanings." Some of them were involved with the activities of the Edmonton Social Planning Council which strongly supported a decentralized and locally-integrated approach to human services, stressing local decision-making in school operation and community control of school facilities after school

hours. Such individuals claimed that the community had the right to use the schools and perceived education as being only one service within the human services delivery system.

It was the opinion of some observers that the strong commitment of the Superintendent of Parks and Recreation to make the agreement a success had prevented the conflict from erupting earlier, and with his death in November of 1971 and a change in personnel at the Public School District, it became increasingly difficult to maintain the spirit of cooperation that had been evident in earlier years.

Use of Schools and Parks and Recreation Facilities

Parks and Recreation's concerns regarding community access to schools were expressed in a position paper submitted by the Department to the Commissioner of Public Works in May of 1972. The key issues raised were excessive cancellations of school bookings, relatively low priority given to Parks and Recreation programs, summer use of schools, access to school facilities and equipment and school use of the Department's facilities.

Parks and Recreation perceived the regulations under the Joint Use Agreement to be heavily weighted in favour of the Boards. The example used in the document was that their programs were in third place on a priority list for use of schools, whereas the schools had first priority in the use of Parks and Recreation facilities such as pools and arenas. The desire among Parks and Recreation staff to see a change in this priority structure was reflected in memoranda from the supervisors of arenas and aquatics responding to the Director of Revenue Programs' enquiry about desired changes to the joint Use Agreement, (January 11 and 14, 1971). Both communications suggested that school board control over

parks and recreation facilities between 8:30 A.M. and 3:30 P.M. on school days should be reduced to enable the operation of programs that could not be effectively run during the remaining portion of the week (e.g., mothers' and pre-schoolers' programs, ladies' learn to swim). Another suggestion was that a clause be introduced to reserve the right of the Parks and Recreation Department to temporarily cancel a scheduled school board program in the event that an activity of higher priority would require the allocated time. The issue of cancellation of school bookings may have precipitated this suggestion, since it was of major concern for Parks and Recreation at the time. (The schools themselves would often cancel facility bookings that had been made through Parks and Recreation.) The Superintendent of Parks and Recreation sent a very strong letter, drafted by the Assistant Superintendent who was the City's representative on the Joint Planning Committee, to the Director of the School Board's Maintenance and Operations Branch complaining about the massive booking cancellations, some of which resulted from a staggered education week over a three-week period in March. He suggested that:

This type of wholesale disregard and lack of appreciation of the Community Use of Schools Agreement put the whole agreement in jeopardy. Individual and block cancellations of programs during this past season has reached a point where we find it extremely difficult to justify continuation of our effort to co-operate in joint use of facilities. (Letter from: Superintendent, Parks and Recreation, City of Edmonton to Director of Maintenance and Operations Branch, February 12, 1971)

The Public School Board interpretation that the Agreement was only in effect during the school year also drew sharp criticism from Parks and Recreation. This interpretation reflected a concern among Public School Board trustees and administrators that the expected significant increase in summer use would result in a major increase in district's cost. The

total community use of schools was recognized by the Parks and Recreation Department as a practice which could create problems for the school boards since the only way of accommodating community use needs in a one-caretaker school was to have a caretaker work overtime. The Boards asked the question, "What would happen if a school were booked every evening of the week and all day Saturday and Sunday?" Considering the cost implications and lack of additional funding, an alternative approach which could control expenditures had to be found.

The availability of limited school facilities other than the gymnasias was another issue of contention. The need to use ill-equipped community halls for programs such as crafts at a time when quality facilities were available at local schools was of concern to Parks and Recreation, who undertook to provide these programs. It was also argued that the equipment available for community use in the gymnasium was limited and often only the old equipment was given to the Department's classes. At the same time, schools expected to use all the equipment in the Department's facilities.

The details of many other problems associated with the implementation of the agreement were listed in Parks and Recreation's submission to the Commissioner of Public Works in its May 1972 report. There was a strong emphasis on the need for clarification, interpretation and definition. Several definitions were sought in the area of planning and development of school and park sites. For example, how should "school building site" be defined for the purposes of identifying the party responsible for development and maintenance of the grounds?

Purchase and Disposition of School Sites

The disagreements between the City and the School Boards on issues associated with the acquisition and disposal of school property delayed the signing of a new Joint Use Agreement (subsequent to the 1970 Agreement) by several years. The City wanted to ensure that sites no longer required by the Boards would revert back to the city and it objected to the provision of dedicated land to the boards beyond the land required for school construction. The position advanced by the City was that the Boards should lease playing fields from the City. The controversy over control of land is discussed in the next chapter.

The Joint Use Agreement Review Committee

The position paper prepared in May of 1972, by the Parks and Recreation Department stating its concerns with the Joint Use Agreement, as well as problems with the implementation of the community school concept, strong disagreements between the two parties regarding land ownership and control, and regulations governing the operation of community wings (a pilot project introduced in two new schools) were major factors that led to City Council's demand that a committee of elected officials be formed to review the Joint Use Agreement. On August 14, 1972, City Council approved the following recommendations:

1. That Council notify the Edmonton Public School Board and the Edmonton Separate School Board that the City wishes to review and / amend the Joint Planning Agreement in accordance with the terms of the Agreement.
2. That the Legislative Committee recommend two Aldermen of the City to sit on a negotiating committee with representatives of the two School Boards.

The Public School Board discussed the City's approved motion in its meeting of August 29, 1972. In discussion, it was recognized that the

City had, in effect, by-passed the established structure of the Joint Planning Committee, taking the matter out of the hands of the administration and involving Trustees and Aldermen. Subsequently, Trustees unanimously approved the following motions:

1. That the Board agree to meet with representatives of City Council with a view to reviewing and amending the terms of the Joint Planning Agreement.
2. That the Chairman appoint Trustees to represent the Board on the committee set up to negotiate changes to the Joint Planning Agreement and that recommended changes be subject to ratification by the Board.

The first meeting of the Joint Use Agreement Review Committee took place on November 16, 1972, at which time it was agreed to focus on the policy aspects of the Joint Use Agreement and to refer technical matters to the Joint Planning Committee. About fifteen members of the respective administrations attended the meetings, which took place over a period of about one year. A working committee appointed by the three parties worked with the two Superintendents and the City Commissioner in developing numerous drafts of a new Joint Use Agreement. At the fourth meeting of the Joint Use Agreement Review Committee, held on June 29, 1973, a proposed agreement was discussed and the following motion was carried:

To accept the Parks and School Joint Agreement made between the City of Edmonton, the Edmonton Public School Board and the Edmonton Separate School Board, subject to resolution of Clause 3 Ownership of Land, which will be resolved and included at a later date. (Joint Use Agreement Review Committee, Minutes, June 29, 1973, p.3)

The agreement was not approved unanimously. One of the two Aldermen strongly objected to it and expressed his concerns during the meetings of the Joint Use Agreement Review Committee. A review of his criticisms provides some insight into his perceptions as well as those of

individuals in the Parks and Recreation Department of what was expected of the review and whether the new agreement might be expected to meet these expectations. This individual, in two written statements regarding the joint use of schools (one just before the vote on the proposed agreement on June 27, 1973 and the other on September 13, 1973, following the Public School Board decision to maintain control over the community wings) made the following claims:

The proposed agreement is a motherhood document, couched in nice-sounding, platitudinous phrases, which fails completely to grapple with the fundamental issues surrounding maximum community use of schools in this city.

It is recognized that an agreement is an important mechanism for resolving the fundamental differences between the City and the Boards or defining a realistic policy for the future community use of schools, but:

1. The agreement does not guarantee a greater role by the local community in determining utilization of schools nor does it guarantee greater community use of schools.

2. The planning, construction, ownership and utilization of community wings attached to school buildings were one of the main reasons the City requested the review of the agreement. The failure of the agreement to solve the issues that brought the Committee into being is the basis for arguing that the efforts failed and that the agreement is not worth anything.

3. The expectations were that a jointly-negotiated policy binding on all parties would be the output of the review. The result is an agreement that indicates that each party sets its own policy and regulations.

4. A proposal to undertake an annual examination of the agreement and jointly report on the operation to a committee of elected

representatives from the three parties was rejected by the representatives of the Boards who formed the majority on the committee. This would have provided some indication of progress towards achieving the objectives of the agreement.

5. The Boards' position does not reflect the desires of the community they represented:

The Boards, particularly the Edmonton Public School Board, by refusing to adopt a more flexible and co-operative stance, display an appalling lack of understanding of the mood of Edmonton citizens. Edmontonians are no longer going to tolerate inefficient use of expensive school facilities - provided by the taxpayer - on the questionable premise that the boards' sovereignty must be preserved. (Statement of an Alderman, June 27, 1973)

Towards Approval of the 1980 Agreement

Following the approval of the proposed agreement by the Joint Use Agreement Review Committee on June 29, 1973, attempts were made to reach an agreement on the remaining clause pertaining to ownership of land through the exchange of respective positions and meetings between the parties and their solicitors. Although they failed to arrive at an amiable solution to the land issue, it was decided to proceed with the agreement and recommend its approval to the elected bodies of the respective parties. Each organization perceived that it was under pressure from its 'public' to continue with the agreement, and each sought ways to agree and, if necessary, live with those problems that could not be resolved completely and try to address these over time. On November 25, 1975, the Edmonton Public and the Edmonton Separate School Boards approved Draft Number 8 of the Parks/School Joint Use Agreement and a day later the same document was approved by City Council subject to amendments requested by the city. These changes, which later were

accepted by the School Boards, reflected (a) the strong belief in and among Aldermen and Parks and Recreation officials that the City had to protect the interests of community agencies and the community leagues in particular, and (b) the desire to ensure that the agreement would be reciprocal. The requested amendments were:

1. The identification of the Community Leagues by name, as part of the total community to benefit from the agreement and that the encouragement of co-ordination and co-operation not be limited to related social agencies but include all community agencies. Draft number 8 of the original agreement, approved by the Review Committee, stated that:

. . . the three (3) parties support, to the extent possible, the extension of their services to the total community and encourage co-operation and co-ordination among related social agencies to better meet the educational and ~~recreational~~ needs of the community.

2. The inclusion of Schedule B which contained a satisfactory general definition of costs incurred by each of the parties in respect to the joint use of facilities of the City and the School Boards.

The approval was also subject to final agreement on Schedule "A" which pertained to the purchase and disposal of land. In November 1975, when Draft number 8 was approved, Schedule "A" reached a stage of agreement in principle by the administrative representatives of each of the jurisdictions. It then required preparation in legal form by the solicitors representing the respective parties and final approval by the elected bodies.

The negotiations over the land issue lasted several years, until the final agreement was approved by the three parties in 1980.

It should be noted that the turbulent period of the early 1970's was over by 1975, and the parties were eager to implement the agreement,

subject to resolution of the land issue. When City Council approved draft number 8 of the agreement, it also supported its administration's recommendation that "the School Boards and the City proceed to immediately plan or implement the intention of the proposed agreement so far as is possible prior to final execution." Reference to co-operation among the administrations of the respective parties was made in a report presented by the Public School Board administration to the Board of Trustees in 1978. The report stated that:

. . . despite the fact that there has been no signed agreement, both the School Boards and the City have operated under the terms and spirit of the proposed Joint Use Agreement and Schedule A and B. There has been little or no difficulty and excellent co-operation has been received from the City. Despite the fact that there is no signed agreement the administrations of all three bodies have worked together in carrying out the direction of their respective principals in a co-operative manner. (Edmonton Public Schools, "Joint Use Agreement", Report Submitted to Board, December 7, 1978)

As indicated above, the change in personnel in the administration of the Public School Board and the Parks and Recreation Department was perceived to be an important factor in the shift from turbulence to stability in the relations among the parties to the agreement.

The 1980 Agreement

The examination of the 1980 agreement is comprised of two parts. The first part compares the 1970 and the 1980 Joint Use Agreements and the second part describes the nature of the 1980 agreement as it compares to some of the expectations of those who desired the review and amendment of the 1970 agreement.

Each of the agreements consists of three parts: the preamble, the terms and conditions related to duration and termination. The comparison addresses each of these parts separately.

1. Preamble

The paragraphs in this section start with the word "whereas" and describe some of the background to the agreement. The 1970 agreement identified the reason for requiring a new agreement. It stated that the 1966 document had not been forwarded for approval to the Minister of Education in accordance with the School Act and therefore was invalid and defective for debenture borrowing by the City. The reasons that the respective parties were interested in the agreement were also identified in this section. The City's interest resulted from its purpose: to develop and maintain land and facilities for parks and recreational purposes and to organize and administer public recreation programs. The Boards, although not responsible for recreation services, were interested in the agreement because they were prepared to make their buildings and grounds available for the community provided that to do so it did not conflict with the operation of school activities. All three parties, it is suggested, subscribed to this agreement because they wished to use these facilities for the maximum benefit of the community.

The preamble to the 1980 agreement, on the other hand, places strong emphasis on the respective responsibilities of the parties and clearly identifies that the boards' responsibility is the provision of educational services. It states that "it is the responsibility of the Public School Board and the Separate School Board to develop educational programs and provide the necessary facilities and sites for these programs." The commitment to recreation appears to be downgraded by the use of the term "to the extent possible" with reference to extending services to the total community. This term leaves the parties an "escape" and allows them to create reasons for not providing access to

facilities while still complying with the agreement. For example, one could argue that in a one-caretaker school it may not be possible to fully utilize the facilities without incurring additional costs or jeopardizing the security of the school. Furthermore, additional expenditure of funds on community activities is not possible since it means shifting resources away from education, the Boards' area of responsibility.

A further example of the use of noncommittal words in the agreement is the verb "encourage" used in relation to co-operation and co-ordination in the process of meeting the educational and recreational needs of the community. Another reference to the tendency to "protect" education and the Board from the wider community interests supported by the City is in the emphasis that the resources and facilities of the parties are "theirs" as opposed to the position taken by some City and Parks and Recreation officials who had suggested that the facilities belonged to the community. An addition in the 1980 preamble is a statement related to the need of each of the parties to keep records of the costs associated with the Joint Use Agreement and have these costs reviewed annually by the Joint Planning Committee. As indicated in the section on the reciprocity of the agreement, this has proved to be difficult to implement and the parties have not to date complied with this provision.

2. The Terms

The negotiation of issues associated with the acquisition and sale of land over a number of years resulted in the development of Schedule "A" which was made part of the agreement. Issues that had not been part of the Edmonton scene prior to 1970 made land a much more central question

than it was in the 1970 agreement. For example, the development of a relatively large number of neighbourhoods at the same time and City Council's heavy involvement in the land development industry made the City extremely sensitive to the issue of the Boards' ownership of land. In addition, the decline in enrollment and the shift of population to the outlying parts of the City resulted in school being surplus to the Boards' requirements. The City wanted to ensure that such land would continue to serve the public.

The City requested on November 26, 1975 that the agreement place greater emphasis on monitoring the expenditures of the parties in respect to the agreement and that the data be reviewed annually by the Joint Planning Committee. This came after the Joint Use Agreement Review Committee rejected in 1973 a motion calling for the Superintendents to prepare an annual joint report on the operation of the agreement for presentation to a Joint Elected Representative Committee. The Boards agreed with the 1975 proposed change and its representatives worked with the City's Parks and Recreation administrators to develop Schedule "B" which defined the costs incurred by the respective parties. Reference to this schedule was made in the preamble but it was perceived by the parties to be a requirement of the agreement.

In addition to mention being made of the two schedules, there were references to three sets of regulations: Regulations Governing Use of Schools, Regulations Governing Use of Edmonton Parks and Recreational Facilities and Parks/School Site Standards. The regulations were in existence prior to 1970 but were not part of the 1970 agreement. Although they were referred to in the agreement, the regulations were not established as a joint endeavour nor approved by all. Each set of

regulations was developed by the jurisdiction responsible for providing the service and having control over the land and the facility. The school boards, for example, developed their own regulations governing the use of schools and approved the school site standards. While it may appear on the surface that the 1980 agreement was more prescriptive rather than a broad term "gentlemen's agreement," in reality the Boards were able to maintain full control over "their" schools, the activities taking place in them and the property under Board jurisdiction. There is evidence to suggest that in areas of concern to the Boards they acquired more flexibility and autonomy. Section 7 of the 1970 agreement led to the pilot projects of constructing community wings attached to new schools. The Public School Board decided to maintain ownership and control over these community wings by paying the cost of construction in order to ensure that alcohol consumption would not take place on Board property. The relevant section in the 1970 agreement stated that:

. . . . in planning school buildings, the Boards shall provide for maximum community use or the City shall pay the cost of those portions of new buildings and additions to existing buildings which provide for specific City recreational purposes as approved by the parties hereto. (Joint Use Agreement, 1970, Section 7, p.4)

The section that addressed the process of planning schools in the 1980 Agreement stated that "the Boards in planning school sites and facilities shall liaise with the City to provide for City and community use." Furthermore, it was clearly stated in the 1970 Agreement that the Boards construct, operate and maintain school buildings and facilities at their expense and provide access to schools and facilities after school hours, on weekends and on holidays to City sponsored programs and approved volunteer, non-profit associations, clubs or groups free of charge. In the new agreement there was no reference to free use of

facilities. It was indicated that the availability of school buildings to the City was specified in the Regulations Governing Use of Schools. Although changes in the regulations would have to be presented to the Joint Planning Committee for their consideration and recommendations, the Boards were the final authority in establishing the regulations.

The reference to free use of Parks and Recreation facilities by the schools was also eliminated in the 1980 agreement. The required flexibility to be able to charge for school visits to the zoo or use of a football stadium was important especially at a time of financial restraint in this department.

3. Duration and termination

Both the 1970 and the 1980 agreements required approval from the Minister of Education prior to coming into force. The 1970 agreement required thirty (30) days advance notice for the purpose of proposing an amendment or termination. The 1980 agreement extended the minimum prior notice period to ninety (90) days and included a separate agreement for the continuation of the section regarding the purchase of land even after the termination or expiration of the agreement. Section 4.4.1 of Schedule "A" states that each Board shall sell and the City shall purchase all non-reserve land. This arrangement is as much as possible in perpetuity. Section 4.4.3 clarified this point indicating that:

4.4.3 Notwithstanding anything in this schedule or of the Agreement of which it forms a part contained to the contrary, the agreement to purchase and sell each parcel of Non-Reserve Land referred to in sub-paragraph 4.4.1 hereof shall continue in full force and effect for the maximum time permitted by law notwithstanding that the Agreement, this Schedule, or any part thereof is void or voidable, and such agreement to purchase and sell shall be severable from the Agreement and all non-applicable portions of this Schedule.

Summary

This section focused on a number of conflicts between the parties to the agreement. The flexibility that was perceived to be a major advantage of the agreement prior to 1970 was no longer seen as desirable by some City representatives and elements in the Parks and Recreation Department. There was an expressed desire to have a more prescriptive agreement that would guarantee the right of the community to use schools. Furthermore, such an agreement, it was argued, would avoid misinterpretation of the rights and responsibilities of the respective parties. The spirit of co-operation which had characterized the Joint Planning Committee in the 1960's gave way to distrust and long arguments over detailed operational matters. The Committee, which consisted of unbalanced representation (the City's middle management and School Board's senior management) did not meet for a number of years until it was revived in the late 1970's. There is some evidence that personal conflicts stemming from different philosophical beliefs contributed to the impasse. The numerous operational concerns of Parks and Recreation, together with difficulties associated with the implementation of community schools and the community wings attached to schools, resulted in the demand by the City to establish a Joint Use Agreement Review Committee. The school boards' protective stance and their majority on the committee resulted in the approval of a proposed draft which did not address the expectations of those who desired a prescriptive agreement that would guarantee community access to schools after hours and decentralization to the community of decision-making on the use of the schools after school hours.

The draft agreement which was approved in principle in June 1973 was granted final approval in 1980 following a long debate over the acquisition and disposal of land. The 1980 agreement remained a flexible one with each organization responsible for the development of regulations pertaining to its own facilities.

Formalization - Why Was a Formal Agreement Perceived to be Necessary?

Several studies have identified formalization as one of the dimensions of interorganizational relations (Guetzkow, 1966; Marrett, 1971; Andrews, 1978). The interaction ranges from a formal agreement signed by the parties involved to informal relations. Marrett (1971) suggested that in social welfare settings and other human service organizations, formal agreements are not as frequent as informal interaction among individuals and sub-units of the organizations. In this section, an attempt is made to identify the reason for having a formal Joint Use Agreement and to identify some of the potential implications of not having such an agreement.

Although the first agreement was signed in 1959, it was not until 1970 that a written rationale for signing a formal agreement was offered in the documents reviewed. The preamble to the 1970 agreement offers a rationale for the existence of a formal agreement. It states that:

WHEREAS an Agreement for the Joint Use of facilities was entered into among the parties and was dated 31st January, 1966, and this agreement has worked satisfactorily from the standpoint of the parties, it is defective for debenture borrowing purposes since the said Agreement prior to execution did not receive the prior assent of the Minister of Education as is required by Section 92 of the School Act. (Joint Use Agreement, 1970, p.2)

This suggests that a formal Agreement was required by the City in order to secure debenture borrowing for the purpose of capital investment

on grounds development and improvements. The need for a specific bylaw and an agreement to justify major expenditures in the City budget was proposed as the City's rationale for wishing to have a formal agreement. It is interesting to note that this rationale was not confirmed during the interviews with individuals who were familiar with the financial operation of the Parks and Recreation Department. It was suggested by interviewees that the agreement has not in fact been used for this purpose. The securing of debenture borrowing could not have been the justification for the earlier agreements in 1959 and 1962 because it was only commencing in 1970 that large-scale capital investment was required for grounds development on new sites. Prior to 1970, the City paid for such improvements from its operating budget. The reason suggested for having the earlier agreements was the desire to have an existing atmosphere of positive co-operation continue beyond the existing administrations. It was recognized that the co-operation regarding ownership of combined school and park sites benefitted the community and that arrangements should continue under similar guidelines, notwithstanding any changes in the organizations' personnel.

The second written document that provides some insight into the reasons for having a formal agreement is the Planning Act. Following provincial commitment to extending community use of schools and the signing of numerous joint use agreements across Alberta, the new Planning Act of 1970 provided direction regarding the use of reserve land dedicated for public use by developers. This Planning Act stated that:

26.1(1) A reserve shall be used by a municipality only for the following purposes:

- (a) a public park;
- (b) a public recreation area;

(c) a school site or part thereof where the school authority has entered into an agreement with the municipal authority whereby the school is to be used for community purposes outside school hours;

(d) a planted buffer strip separating an industrial area from a residential area.

26.1(2) Where a reserve parcel has been allocated for the use of a school as prescribed in subsection (1) and that use is discontinued, the ownership to the reserve parcel reverts to the municipality.

(The Planning Act, 1970, Section 26.1)

This section of the Planning Act maintains that eligibility for reserve land for school sites is limited to those school authorities which have signed an agreement enabling the community to use the facility after school hours. The requirements under this Act were opposed by School Boards shortly after its release, and in 1972 the Minister of Municipal Affairs requested representations concerning proposed changes to the Act. The Edmonton Public School Board's position, which was later adopted in the revised Act (1977), suggested that the school be specifically identified as a sharing authority without qualifications, i.e. joint use agreements. The Planning Act, 1977, provides for the allocation of school reserve by the subdivision approving authority in accordance with local needs even in the absence of an agreement (The Planning Act 1977, Section 101(1)(b)). Another suggestion made by the Board, that local school authorities have the right to dispose of reserve and non-reserve land in accordance with any agreement between the school board and any other party, was not fully supported in the Act. Furthermore, the revised act created another reason for having a formal agreement - to settle the issue of the disposition of boards' surplus sites. Section 109(1) states that:

If a school authority no longer needs school reserve or municipal and school reserve, the school authority shall transfer the land or its interest in the land, as the case may be, to the municipal corporation of the municipality in which the school reserve or municipal and school reserve, as the case may be, is located, for such consideration as is agreed between them. (The Planning Act, 1977, Section 109(1))

The City of Edmonton's desire to control land declared surplus by the School Boards was perceived by a Parks and Recreation senior administrator to be the reason for requiring a formal agreement. Experience in the early 1970's in which the Public Board had sold or exchanged non-reserve land without giving the City the option of first refusal was of major concern to City officials. This was especially true at a time when additional sites were expected to be declared surplus by the Boards, and open areas in many of the older parts of the city were limited.

The turbulent period in the interorganizational relations experienced during the early 1970's led to a variety of explanations of why a formal agreement was necessary. It appears that the rationale changed with the circumstances and reflected both the organizations and the individuals involved, as well as those individuals' areas of involvement in relation to the Joint Use Agreement.

At the elected level, it was perceived that the formal Agreement was needed in order to establish an agreed-upon boundary of responsibility.

A Public School Trustee suggested that:

It was necessary to establish the authority of the school board since it was in question by the City's administration, especially in Parks and Recreation, and by local community activists. It was important to establish that the Board is not subservient to City Council.

A similar view was expressed by a Separate Board Trustee who perceived that the written agreement was needed in order to establish the

boundaries of respective responsibility. He suggested that an agreement was necessitated by the City's wish to maintain land title and control the land and the building after school hours because of its heavy investment in improving the site. This position was strongly opposed by the Boards and they joined forces to maintain their control. In his view, if the City had not adopted this position, a formal agreement would not have been necessary.

The maintenance of the exchange was significant for all three parties and therefore, there was an underlying desire to keep the Joint Use Agreement intact. The Parks and Recreation Department is responsible for the provision and administration of recreation facilities and programs to City residents. Without access to the Boards' buildings and sites, the role of the Department would have been in jeopardy. Furthermore, the massive improvements undertaken by the City to sites owned by the Boards and the construction of most playgrounds on board property would have meant that the Boards could "walk away" with improved sites without providing the city with guaranteed access to the facilities. The perception in the Department was that the public wanted Parks and Recreation to serve as a mediator to have the schools opened up for community use. The threats of terminating the agreement therefore were based on the assumption that the Boards would not exclude the community from having access to its grounds and facilities. One of the advantages of a combined park and school site was the efficiency in the design of the sports field. Prior to the time when combined sites were used, it was necessary to acquire about 15 acres of land for separate elementary school and park sites, while the combined site enabled the provision of

similar facilities in a 13 to 13.5 acre site. These savings would have been lost with a return to the pre-1960 site design.

On the other hand, the agreement and the related regulations established the terms and the formula for the Boards' access to reserve land. Without it, the City would have had control over the school board needs for reserve land through the subdivision approving authority, which in Edmonton is the City's Municipal Planning Commission. It should be noted that the Boards, as in previous years, had the option of purchasing non-reserve land and were not totally dependent on reserve land. However, this option would have meant the "division" of valuable resources from education to the purchase of land. As a matter of fact, school sites in the 1950's and before were purchased by the Boards who received free title for the land. It was also perceived that the Boards guarded the agreement because they got more out of it in terms of free grounds design, development, and maintenance. Furthermore, the Board would have had to spend additional resources on the acquisition of land (e.g., administration of the land transfer process, the cost of land and maintenance of its grounds).

It should be noted that the Boards did not experience a major reduction in the service provided by the City during this turbulent time because individuals at the operational level continued to work cooperatively in the process of acquisition, design, development and maintenance of the grounds. At the operational level it was recognized that a number of problems existed but it was believed that the agreement was basically sound, and this message was conveyed to the higher levels of the organizations (e.g., Parks and Recreation report to the Commissioner of Public Works, May, 1972, p.1).

It appears that although a formal agreement was not mandatory, there were sufficient incentives to lead to the signing of one. There was in existence enabling legislation, which allowed the parties to reach and sign an agreement which would bind them. In the case of the two school boards, it was necessary for them to receive the approval of the Minister of Education prior to making a commitment. The enabling legislation that was in effect in the 1970's is presented in three provincial acts: The Municipal Government Act, The Planning Act and the School Act.

Section 118 of the 1977 Municipal Government Act enables municipalities and school authorities to reach and sign a joint agreement. It states that:

118 (1) Subject to the other provisions of this Act, a council may pass a by-law authorizing the making of an agreement with the council of any other municipality, the board of trustees of a school district or division or the Minister on behalf of any improvement district or special area:

(a) For the joint construction, ownership, maintenance, operation or use of a public work or building, or

(b) for the performance of any other matter or thing considered by all the councils or boards, or the Minister concerned to be a benefit to their respective municipalities, school districts, school divisions, improvement districts or special areas, and may enter into an agreement as to the joint control and management of anything that concerns their respective municipalities, school districts, school divisions, improvement districts or special areas.

(2) Where an agreement is entered into pursuant to subsection (1), the council may in the by-law:

(a) appoint one or more of its members to be members of a joint committee with members appointed by the board of trustees of a school district or school division or by the councils of other municipalities or the appointee of the Minister on behalf of any improvement district or special area, and

(3) A committee established pursuant to subsection (2) may in each year requisition the council of each municipality, the board of trustees of a school district or school

division or the Minister for the proportionate share of the cost of operating the undertaking and expend any sums so requisitioned for the control, management, upkeep and operational expenses of the undertaking.

(4) A committee established pursuant to subsection (2) shall in each year furnish the council of each municipality, board of trustees of a school district or school division concerned or the Minister with an audited statement of its receipts and payments for the preceding year and shall also supply each council, board of trustees of a school district or school division or the Minister with such information regarding its management and operation as is considered necessary.

(Municipal Government Act 1977, Section 118)

Similar provisions which are subject to prior approval of the Minister of Education have been available in the School Act since 1970.

Section 103 of the 1980 School Act provides that:

103 (1) Subject to the prior approval of the Minister, a board may enter into an agreement

(a) with one or more other boards for the joint construction, ownership, control, management, maintenance, operation or use of a school building or a building to be primarily used by pupils of one or more districts or divisions, or

(b) with one or more other boards, persons or municipalities for the joint construction, ownership, control, management, maintenance, operation or use of a public work or building.

(2) If an agreement is entered into pursuant to subsection (1) or section 169(c), the board may

(a) appoint one or more of its trustees to be members of a joint committee with persons appointed by another board and if appropriate, a person or municipality, and

(b) delegate to or impose on the joint committee any powers, duties, functions and responsibilities that it has under this Act or the regulations or that it has had delegated to it by the Minister under section 12, that it considers necessary.

(3) A board, person or municipality may provide the committee established pursuant to subsection (2) with any funds the board, person or municipality considers proper and the committee may expend any sum received for the

control, management, upkeep and operation of the undertaking.

(4) A committee established pursuant to subsection (2) shall in each year furnish the board, person or municipality with an audited statement of its receipts and payments for the preceding year and shall also supply the board, person or municipality with any information regarding its management and operation considered necessary by the board, person or municipality.

(5) Notwithstanding anything in this Act, for the purpose of this Act and the regulations a board may appoint another board to act on its behalf or on behalf of a joint committee established pursuant to this section.

(School Act 1980, Section 103)

Reference to a possible agreement between a municipal council and a school authority regarding the allocation of municipal and school reserve is made in the Planning Act. Section 101(1) of the 1977 Planning Act stipulates that:

101 (1) Where reserve land is required to be provided, the subdivision approving authority shall

(a) specify the amount, type and location of reserve land that is to be provided, and

(b) allocate the municipal reserve, school reserve and municipal and school reserve between the municipal corporation and each school authority concerned as joint owners or as separate owners

(i) in accordance with an agreement made between the council and school authorities, or

(ii) in the absence of an agreement, in accordance with the needs of each of them as those needs are determined by the subdivision approving authority.

(Planning Act, 1977, Section 101(1))

The provincial government did not limit its activities to the introduction of enabling legislation but also offered incentives to maximize the utilization of schools. On December 29, 1973, the Provincial Government introduced a new grant to support co-operation between municipalities and school boards. The press release stated that:

Under an agreement with the public and separate boards, municipalities over 15,000 population may apply for additional funding. The aim is to encourage optimum use of schools in the larger centres of the province. (Government of Alberta, Press Release, December 29, 1973)

Reference to the extent of the Project Co-operation Grant was made in Parks and Recreation report of June 16, 1975, which identified the financial implications of cancelling the Joint Use Agreement. The document suggested that \$290,000 was available from the Province of Alberta for community use of schools. The available fund is described in the President's Manual, Edmonton Federation of Community Leagues, which suggests that the Project Co-operation-Community Schools Incentive Grant is available to schools for projects which serve to increase the use of schools by the community. Applications for these funds are submitted jointly by the school principal and the District Recreation Co-ordinator and require an indication of community support. The grant is administered by Edmonton Parks and Recreation Department in co-operation with the Edmonton Public School Board and the Edmonton Separate School Board. The grant provides funds for building modification such as the construction of a kitchen, purchase and installation of equipment including basketball hoops and, in some cases, payment of staff salaries.

Summary

This section dealt with two questions - why was it necessary to have a formal agreement and what would have been the implications of terminating the agreement. It was revealed that the early agreements (e.g., 1959, 1962) were formal agreements in order to ensure that future representatives followed in the footsteps of those that had established the agreement. In the 1970's, the rationale for having a formal

agreement became very "dynamic." The perceived reasons appear to reflect the respondents' area of operation; with changing circumstances also the rationale changed. For example, in the early 1970's, elected officials perceived the agreement as a mechanism to gain recognition by the parties involved of their respective responsibilities or to establish agreed-upon boundary of authority. Administrators interviewed saw additional reasons for having a formal agreement including guaranteeing City access, by the agreement, to surplus school board sites; establishing the division of dedicated reserve land between parks and schools; enabling the City to access debenture borrowing; guaranteeing the availability of grounds and facilities for public and school use and permitting major savings in combined site design.

Although provincial legislation (The Planning Act) required at one time an agreement between municipal and school authorities for the provision of community access to schools after school hours as a prerequisite to becoming eligible for reserve land, the Provincial Government did not mandate Joint Use Agreements. A number of items of enabling legislation existed in support of such endeavours, and furthermore special funds were available to enhance community access to schools.

Intensity and Reciprocity of the Exchange

Intensity and reciprocity are two dimensions of interorganizational relations examined by Marrett (1971). The concept of intensity refers to the amount of resources committed. Aldrich states that "the level of intensity indicates the amount of investment an organization has in its relations with other organizations" (Aldrich, 1979, p.275).

Reciprocity, on the other hand, describes the degree of symmetry in the exchange between the organizations. It has been suggested that reciprocity between public sector organizations is difficult to assess because the value of a service to the public can not be determined using a 'liquid' resource such as money as the measure of the exchange (Aldrich, 1979).

The intensity and reciprocity associated with the Joint Use Agreement were examined in terms of the financial contribution of the three parties. Basically, the 1970 agreement stated that the two school boards were to make school buildings available for recreational purposes, without charge, in the evenings and on weekends and holidays. The Edmonton Parks and Recreation Department in return, was to plan, develop and maintain the school grounds. In addition, the school boards could use the Department's facilities free of charge during school hours.

Relevant documents including statistical reports and reports addressing the methods of calculation and their implications, as well as minutes from meetings and articles in the local newspapers were used as the key sources of data. Interviews with individuals from each of the three parties were used to verify the findings and in order to shed additional light on the resource exchange. In the following, the controversy over the contribution of the parties to the exchange is highlighted and two methods of calculating the exchange have been used to emphasize the significance of the calculation method in determining the organizations' contribution i.e., the reciprocity and intensity of the exchange.

The requirement to maintain information on the respective expenditures was an integral part of the 1966 and the updated 1970

version of the Joint Use Agreement. The agreement required that "records of costs and program operation shall be kept by each party to provide data for the review of the agreement." Despite the existence of this section, little was done in terms of a systematic annual review of the expenditures of each party as part of the commitment to the agreement. Furthermore, there was no agreement in place regarding what should be included in calculating the costs and how the cost elements should be calculated.

When the confrontation between the City and the Public School Board arose in the early 1970's regarding community access to school facilities, the issue of the reciprocity of the agreement was brought to the fore mainly as it related to the commitment of each party to the goal of extending community use of school facilities. The issue was raised by an alderman in the December 13, 1971 Council meeting. The City administration was asked to provide information on "what is the cost of this program (the Joint Use Agreement) to the City and to the school boards?" Following this inquiry, on February 9, 1972, the Commissioner of Public Works requested the Parks and Recreation Department to prepare a 'position paper' regarding its concerns with the Joint Use Agreement which should include "a minimum of one year of revenues and expenditures for the City of Edmonton."

The Public School Board and its administration were also sensitive to the issue of a 'balanced' agreement. The April 25, 1972 Public Board minutes describe a report which highlights the free community use of school facilities and suggests that this service cost the Board \$15,000 during the month of February, 1972 alone. Another reference to the Board's awareness of the issue was made in the May 10, 1972 issue of the

Edmonton Journal in which a Public School trustee allegedly stated that the Joint Use Agreement saved the board money in the long run. This statement could be interpreted in at least two ways: (a) the efficiencies in the Agreement is credited with saving the Board funds and (b) the implementation of the Agreement resulted in an imbalance in which expenditures were shifted from the Board to the City. The latter was perceived by some Aldermen to be the case.

During the height of the controversy over control of activities and ownership of the community wings at Evansdale and Thorncliffe Schools (a detailed discussion is presented in Chapter 6 in the section entitled 'Alcohol and Education on School Property'), two aldermen accused the Public Board of not living up to the spirit of the Agreement. They claimed that a study demonstrated an imbalance in the Agreement, and as a result the two Boards were saving about a million dollars annually. One of the two Alderman was quoted in an article published in the Edmonton Journal on October 5, 1972, as having said that getting out of the Joint Use Agreement "means the board will have to raise school taxes by at least one million to provide for what they get under the agreement now." The administration of the school board did not have the report and could not provide an appropriate reaction in response to Trustee inquiry regarding the imbalance. They were concerned about any assumptions used and suggested that the available City annual financial statements for 1969 and 1970 indicated that the actual expenditures for ground maintenance were less than \$200,000 per year for the combined public and separate school sites.

An examination of relevant documents reveals the basis for the statement of the aldermen. Table 5.2 suggests that the 1971 estimated

Table 5.2

Summary of Expenditures Incurred by Edmonton Parks and Recreation
Under the Joint Use Agreement, 1971

DEPARTMENT FACILITY	1971 ESTIMATED NET COST
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Athletic Grounds	\$ 1,000
Arenas - Artificial Ice	59,500
Clarke Stadium	400
Pools	89,265
Renfrew Ball Park	500
Ski Hills	61
Fort Edmonton Park	150
John Walter House	5,000
Nature Walks	2,000
Storyland Valley Zoo	45

\$ 157,921

Golf Courses - Net Revenue	\$ 395
Driving Range - Net Revenue	400
Planetarium - Net Revenue	1,940

\$ 2,735

Estimated Net Cost to Department for operation of facilities	\$ 155,186
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Cost to Department for maintenance of school grounds	223,832
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TOTAL OPERATING EXPENDITURES TO DEPARTMENT	\$ 379,009
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Capital Expenditures for development of school grounds	568,740
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TOTAL OPERATING AND CAPITAL EXPENDITURES	\$ 947,749
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Source: The City of Edmonton Parks and Recreation,
The Joint Use Agreement, May 1972, p.45

net cost incurred by Edmonton Parks and Recreation under the Joint Use Agreement was \$947,749. The report describes the basis for the calculation and the Board's administration would have questioned the average salary used (they have continuously maintained that Parks and Recreation is employing students and are using a much higher average salary) and the fact that the report ignored expenses that the Department would have continued to incur if the agreement had been cancelled. A subsequent report (June 16, 1975) suggested that the Department would continue to carry about one third of the expenses (35.6%) even if the agreement were no longer in effect. A summary of use of schools is presented in Table 5.3 which indicates that the total number of hours during which school facilities were used by the Department and by other approved recreational groups was 67,932 hours. Using the average rates charged by the boards to commercial groups (based on \$10 per booking and \$7 per hours of use) would result in Board annual revenue of \$562,476.

Applying the factors presented above would suggest that, in general, the exchange was reciprocal especially when considering the amount in relation to these organizations' annual expenditures. Edmonton Parks and Recreation would have saved in 1971 about \$638,000 and the Boards would have gained about \$562,000 from rental charges to help offset the additional expenses if the agreement were no longer in effect. This hypothetical case is using average costs and does not take into consideration that community use of schools would likely have declined as a result of the charges. Other related hypothetical questions that were not answered are whether the school boards would have demanded the fees or would have continued to provide the space free of charge and whether Parks and Recreation would have neglected their responsibility for

Table 5.3

School Use by the City's Parks and Recreation Department
and Other Approved Recreational Groups, 1971

	PUBLIC	SEPARATE
No. of schools available	142	77
No. of gymnasias available	161	73
No. of schools used	142	70
No. of sessions (Dept. sponsored)	5,719	1,594
No. of sessions (Other groups)	13,957	6,430
Total no. of sessions held in schools	19,694	8,024
No. of hours used by Department	13,027	3,040
No. of hours used by other groups	36,590	15,275
Total no. of hours used	46,617	18,315
Average no. of hours per session	2.52	2.28
Total no. of sessions held in all schools	28,718	
Total no. of hours used in all schools	67,932	

Source: City of Edmonton Parks and Recreation,
The Joint Use Agreement, May 1972, p.11

offering recreation programs to City residents or would have leased space from the boards.

Another attempt by the City of Edmonton to examine the reciprocity of the costs associated with the agreement is presented in a report prepared by Parks and Recreation and dated June 16, 1975. It is attached as enclosure 6, "City Analysis of Costs Associated with Parks/School Joint Use," of the administration's report recommending that City Council approve an ammended Joint Use Agreement (November 25, 1975). The report indicated that:

(a) A total of 77,395 hours were booked for using school board facilities to provide Parks and Recreation programs to the community as well as for programs endorsed by the Parks and Recreation Department (e.g., community leagues, sports groups, Y.M.C.A.) during the 1973-74 school year.

(b) Non-department programs outnumbered department programs by three to one. As a result if the Joint Use Agreement were to have been cancelled, it is assumed that those who suffer the greatest loss would have been department-endorsed groups such as community leagues, boy scouts and cubs and brownies.

(c) Total expected costs if charges were to be applied amounted to \$657,645.

(d) The annual savings to the City's Parks and Recreation Department were estimated at \$991,473 and additional revenue as a result of charges for the use of pools and arenas was seen to be approximately \$102,000.

Notwithstanding the perceived gap, it was recommended that the agreement be approved subject to proposed amendments. The difference in financial benefit to the boards represented an extremely small part of

the City's budget, and the programs offered by Parks and Recreation were heavily dependent on school facilities such as gymnasias. It was perceived that cancellation of the agreement would enable the boards to benefit from past investment by the City in sites to which the boards maintained title. Furthermore, cancellation would have been politically unacceptable. The trend of increased community use of space would have been reversed and the opportunity to serve the public in an efficient manner lost. It was also recognized that all three parties would have to participate in the establishment of the data on respective costs if it were to have any credibility. This thought is reflected in the amendments to the agreement which were requested by the city.

Following approval of Draft 8 of the Joint Use Agreement by the Review Committee (one of the two city Aldermen on the committee opposed it), the city administration recommended on November 25, 1975 that City Council approve the draft agreement subject to a few amendments which would include the following provision for the establishment of a base for determining the intensity and reciprocity of the agreement:

1. That the boards and the City agree that each will keep record of costs which would be reviewed annually by the Joint Planning Committee.
- The specific statement which refers to this point maintains that:

WHEREAS the City and the two (2) Boards agree that the costs (as defined in Schedule "B") incurred in respect to joint use of facilities will be kept by each party and reviewed annually by the Joint Planning Committee with any recommendations for assessment and control of costs and usage of facilities to be made by the committee to the respective Superintendents for resolution by the parties to this agreement. (Joint Use Agreement, 1980, p.2)

2. A satisfactory definition of costs incurred in respect to joint use of facilities be appended to the Agreement as Schedule "B". The justification for including Schedule "B" was that it would "ensure that a

relative financial outlay of each of the parties can be identified and can be analyzed to determine whether or not they are in proportion to benefits received" (City Council Minutes, Item. D.2.g. Parks/School Joint Use Agreement, November 25, 1975, p.52). This Schedule was expected to include the costs of: (a) maintenance of school lands, (b) site work on new school grounds, (c) design of school grounds, (d) use costs for city facilities and programs and (e) use costs for school facilities and programs.

City administration intended to have Schedule "B" completed prior to the third reading of the Bylaw authorizing the Joint Use Agreement. A working group with representation from Edmonton Parks and Recreation, the Edmonton Public School Board and the Edmonton Separate School Board was put together in order to develop Schedule "B". The report presented to the two Superintendents and the Commissioner of Public Works on June 19, 1978 (delays in negotiations over land meant that the need for Schedule "B" was not urgent). Considering that the parties could not agree on what should be included in the calculation, two methods of costing were used: the incremental and the full costing methods.

1. Incremental Method. This method focused on all the costs which would not have been incurred if the Joint Use Agreement were not in effect. It assumed that all out-of-pocket costs incurred because of the very existence of the Joint Use Agreement would apply. The costs identified in this analysis are:

- a. the extra costs associated with keeping pools, arenas and schools open when they would normally be closed;
- b. school site maintenance work by the Parks Department (e.g., turf maintenance, marking school fields, repair goal posts);

- c. debt retirement and planning and design costs of school ground construction costs on the part of the Parks Department;
- d. custodial overtime for community school use;
- e. school maintenance, especially gymnasium floors and shower rooms;
- f. physical education supplies for community school use.

2. Full Costing Method. This method incorporates indirect costs associated with the Joint Use Agreement in addition to the incremental costs. The indirect costs include line supervision, administration and debt retirement. It should be noted that the portion of costs attributed to a particular participant of the Joint Use Agreement was based on the percentage of use.

The 1976 operating data were analyzed using these two methods (Tables 5.4 and 5.5). The analysis suggested that the definition of the resource flow was a key element in establishing whether the exchange was reciprocal. The Incremental Cost Method showed that the Parks and Recreation Department spent \$1,388,000 in 1976: \$201,000 more than the combined expenditures of the two school boards (\$1,187,000). However, when proportional costs of such expenses as debt service, utilities and administration are included, the two school boards spent \$3,134,000, which is \$596,000 more than the City's Parks and Recreation Department spent on joint-use-related services and equipment (\$2,538,000).

Members of the committee which worked on the development of Schedule "B" realized that applying actual expenditures using the Full Costing Method on an annual basis was not the most desirable approach considering that:

1. The citizens of Edmonton, both adult and student, greatly benefit from the existing agreement or method of operation.

Table 5.4

Intensity and Reciprocity of the Joint Use Agreement: 1976
Expenditures of the Three Parties Using Incremental Costing Method

	SEPARATE BOARD	PUBLIC BOARD	TOTAL
Physical Education Supplies	\$ 8,000	\$ 20,000	\$ 28,000
Maintenance	65,000	75,000	140,000
Custodial Service:			
i) Regular	237,000	520,000	757,000
ii) Overtime	59,000	203,000	262,000
TOTAL EXPENDITURES: SCHOOL BOARDS	\$ 369,000	\$ 818,000	\$1,187,000

PARKS AND RECREATION

School Board Use of:

i) Pools	\$ 174,000
ii) Arenas	153,000

Maintenance of School Grounds

i) Sports Facilities	365,000
ii) Turf Maintenance	370,000

Debt Retirement on Contruction
of School Grounds

270,000

Planning and Design Costs

56,000

TOTAL EXPENDITURES:
PARKS AND RECREATION

\$ 1,388,000

Total 1976 Expenditures by the three parties - using
Incremental Costing Method - \$ 2,575,000

Source: Schedule "B", Parks/Schools Joint Use Agreement,
November 1979, Appendix 3(a)

Table 5.5

Intensity and Reciprocity of the Joint Use Agreement: 1976
Expenditures of the Three Parties Using Full Costing Method

	SEPARATE BOARD	PUBLIC BOARD	TOTAL
Administration			
School	\$ 266,000	\$ 238,000	\$ 504,000
General	37,000	51,000	88,000
Physical Education Supplies	8,000	20,000	28,000
Debt Interest	183,000	210,000	393,000
Maintenance			
General Administration	26,000	40,000	66,000
Maintenance	65,000	75,000	140,000
Utilities	274,000	622,000	896,000
Custodial Services			
Regular	237,000	520,000	757,000
Overtime	59,000	203,000	262,000
TOTAL EXPENDITURES: SCHOOL BOARDS	\$1,155,000	\$1,979,000	\$3,134,000

PARKS AND RECREATION

School Board Use of:	
i) Pools	\$ 686,000
ii) Arenas	391,000
iii) Debt Retirement - pools & arenas	204,000
Maintenance of School Grounds	
i) Sports Facilities	471,000
ii) Turf Maintenance	460,000
Capital	
i) Debt Retirement - school grounds	270,000
ii) Planning and Design Costs	56,000
TOTAL EXPENDITURES:	
PARKS AND RECREATION	\$2,538,000

Total 1976 Expenditures by the three parties -
 using Full Costing Method - \$ 5,672,000

Source: Schedule "B", Parks/Schools Joint Use Agreement,
 November 1978, Appendix 3(b)

2. When one considers the combined operating budgets of the respective School Boards and the City of Edmonton and reflects upon the benefits derived by the taxpayer, the costs as determined by Schedule "B" show that neither party to the Joint Use Agreement is incurring an undue financial burden.
3. Each group is reluctant to establish an accounting group to more accurately define and accumulate the financial costs as the benefits from such refined data would not materially alter the outcome, yet add substantially to the bureaucracy which the taxpayer of Edmonton would have to support. This additional costs would be threefold because each party would have to establish a similar group.
4. No single method of calculating costs will be acceptable to all parties because the City will incur high operating costs relative to the School Boards while the School Boards will incur heavy capital costs relative to the City. (Memorandum from the Ad Hoc Committee for the Development of Schedule "B" of the Joint Use Agreement to the Superintendents of Schools and Commissioner of Public Affairs, June 19, 1978, p.2)

These points were agreed upon by the three parties at the administrative level. It was also of concern that an annual release of the respective findings would lead to constant bickering by politicians which would not be helpful at the operational level. Furthermore, the school board representatives stressed that it was very unlikely that the precondition statement presented in the 1966 agreement regarding future stability would materialize. It was stated that:

. . . it is the opinion of the City and the School Boards that the gross cost of providing school and recreation facilities and programs will remain similar to the present costs under existing programs and conditions. (Joint Use Agreement, 1966, p.2)

School board representatives felt that the extent of the contribution of the respective parties would change because the city's population and community use of school facilities was continuing to increase and with it demands on supplies and services from the school boards. On the other hand, school population during the 1970's declined and experienced a

major shift to newly-developed neighbourhoods. This was expected to result in continued pressure on school construction and decline in school use of Parks and Recreation facilities.

The political support for Schedule "B" granted a few years earlier (approval of an amended Joint Use Agreement subject to the resolution of the land controversy) and the requirement for each organization to maintain a record of its costs that were recognized as impractical. It was recognized that even if a workable formula were to be found which would provide assurance that the agreement was balanced at the administrative level, it was still extremely unlikely that parity of costs among the three focal organizations would result. This would undoubtedly lead to another area of conflict which would be counter-productive to the spirit of co-operation.

Considering the expenditure involved in collecting the data and their limited usefulness, the requirements for an annual review of the costs incurred by each party have been ignored by the parties to the agreement.

Summary

In order to ensure a balance in the costs incurred by the three parties in respect to the joint use of public facilities, the 1966, 1970 and 1980 agreements required that the parties maintain information on their respective expenditures for the purpose of a review of the agreement. While there was a political commitment to this concept, it was difficult to implement it. The parties could not agree on the methods to be used for calculating the costs and determining the extent to which the implementation of the agreement was reciprocal. The City incurred higher operating costs relative to the School Boards while the

School Boards incurred heavy capital expenditures relative to the City. As a result, applying the incremental costing method suggested that the City spent more than the School Boards on the Joint Use Agreement while using the full costing method, which adds indirect costs to the incremental cost, revealed a larger financial commitment by the Boards than by the City. In view of the lack of agreement on the method to be used for calculation, the additional cost of developing and maintaining each type of data, the potential for conflicts resulting from an "unbalanced" expenditure, the relatively limited costs in comparison to the total expenditures of the organizations and the benefits derived by the taxpayer it was decided at the administrative level to ignore this requirement of the agreement.

Summary of the Chapter

This chapter was divided into two main parts. The first described the evolution of the Joint Use Agreement with special emphasis on the period 1970-1980, while the second addressed selected dimensions of interorganizational relations. The first part illustrated a conflict between focal organizations during a turbulent period in the early 1970's. There was pressure from the City's Parks and Recreation Department with support from Aldermen to develop a more prescriptive agreement which would maximize community use of schools in the city, guarantee a greater community role in determining the utilization of schools and resolve the issue of control over community wings attached to schools. The school boards, realizing that open access to schools meant increased expenditures, were reluctant to shift educational dollars to support other activities, and with the growing demands, in the words of a

school board administrator, "the protective stance became stronger and vested interests became the predominant factor" (Interview with a senior administrator, Separate School Board).

Following the turbulent period of the early 1970's, the parties perceived pressure from their constituencies to reach an agreement, and they were prepared to implement it even prior to final approval which was delayed until 1980 when the controversy over land acquisition and disposal was resolved.

The second part of this chapter focused on three major dimensions of interorganizational relations: formalization, intensity and reciprocity. The examination of the first dimension, formalization, dealt with the reasons for having a formal agreement rather than with the rules, policies and regulations pertaining to the implementation of the agreement. It revealed that while there was an understanding of the benefits that could be derived from the agreement, the perceptions regarding the reasons for having a formal agreement varied. The rationale appeared to change over time to reflect changing circumstances.

The reciprocity and intensity of the exchange among the focal organizations were the other two dimensions studied in this chapter. These dimensions appeared to be dependent upon the focal organizations arriving at an agreement regarding the general method to be used and the specific items to be included in calculating the costs. The two methods which were applied were 'incremental costing' and 'full costing'. Examination of the results of applying these methods suggested different imbalances in expenditures. The 'incremental costing', which concentrates on operational costs, revealed a higher expenditure by the city while the use of 'full costing', which adds capital expenditures and

administrative overhead suggested that the Boards were bearing a larger financial burden. The extent of reciprocity and intensity reflected the definition and interpretation of the terms and therefore, it is not surprising that the parties could not agree on the method to be used for calculating the respective costs. Since the expenditures on the Joint Use Agreement involved a very small proportion of the total budget of each organization (about 1%) and the difference in the respective expenditures formed an even smaller share, the issue of reciprocity was ultimately ignored by the three parties despite the fact that its calculation formed a part of the requirements of the Joint Use Agreement. Publicizing the difference between the expenditures of the school boards and those of the city on an annual basis was not perceived as conducive to a spirit of co-operation but rather an excuse for creating tension among the parties to the agreement.

CHAPTER 6

THE JOINT USE AGREEMENT: CONFLICTS WITHIN THE METASYSTEM

Introduction

In the late 1960's and the early 1970's, there was increased public concern for civil rights, environmental protection, peace, women's liberation and other social problems (Nagal and Neif, 1980). Within the field of education, there was recognition of a widening gap between the school and the community, both of which are part of the metasystem under study, and attempts were made to bridge the gap. Schools were traditionally considered a "little island set apart" from the rest of the community and it was hoped that through a transformation of the school into a community centre it would be possible to concentrate on the needs of the individual without limiting the services provided to those directly related to education. Community schools were introduced in a large number of jurisdictions and some decision-making powers were decentralized to local communities.

This trend did not by-pass Edmonton. The briefs submitted by the City of Edmonton and the Public School District to the Commission on Educational Planning (described in more detail in Chapter Seven) reflect the demand to provide local communities with a degree of decision-making power and involvement which would not be limited to the use of school facilities after school hours but would also include participation in changing the educational programs in their schools.

Chapter Five highlighted the expectation among aldermen and the Parks and Recreation Department that the Joint Use Agreement should be more prescriptive. They demanded that the agreement provide guarantees of increased community decision-making power over the use of schools after regular school hours, resolve the controversy related to local control of community wings and address the numerous concerns of the Parks and Recreation Department (e.g., summer use of schools; cancellations of community bookings, access to specialized space within the school). Tensions within the metasystem during the early 1970's that brought about the establishment of the Joint Use Agreement Review Committee were directly related to the boundary of control and the maintenance of authority. The controversies and their resolution are presented and analyzed through the use of three major conflicts: (a) the disagreements over the community use of schools and the community school concept; (b) the policy argument over the consumption of alcoholic beverages during adult functions at a school, and (c) the conflict over land issues. While the first two conflicts were addressed (although not to everyone's satisfaction) prior to the approval in principle of the agreement by the three parties in November 1975, the final approval was delayed until 1980, due largely to the continued conflict over land-related issues. Each of these conflicts is addressed in a separate section of this chapter. Together they provide insight into sub-problem 4 which seeks to identify some of the pressures originating from within the metasystem and associated with the positions taken by the focal organizations on the Joint Use Agreement.

Because the first two sections focus on a specific policy controversy dealing with a local community attempt to introduce a change in school

board policy regarding the consumption of alcoholic beverages during adult functions after school hours, it was deemed necessary to review relevant policy analysis literature. This review is presented at the end of Chapter Two and provides further insight into the positions taken by the two signatories to the Joint Use Agreement who were directly involved in the controversy. The literature review contrasts the public official's self-interest with the individual's perception of the public interest and reviews the value context and the policy arguments proposed by Dunn (1981) to clarify different types of values. Dunn's typology of policy argument is used to analyze the case in support of a policy to allow the consumption of alcohol on public school property.

Community Use of Schools and the Community School Concept in Edmonton

Introduction

This section focuses on the early development of the community school concept in Edmonton. It commences with a description of the initial expressions in favour of maximizing the community use of schools and is followed by a review of the context within which the first framework for implementing the new philosophy of delivering educational services was presented. This context reflects the community-oriented activities that were in place in the early 1970's and the position and attitudes of community groups and City departments regarding this concept.

An overview of the community school concept presented to the Public School Board by its Extension Services Branch is provided. This is followed by a discussion of the elements standing in the way of a district-wide implementation, including structural obstacles and perceptions held by the elected officials. Finally, an example of the

summer use of schools is applied to illustrate the conflicts between the two perspectives in more detail.

Initial Demands for Improving Community Access to Schools

Interest in community use of school facilities existed in Edmonton prior to the beginning of the study period in 1970. On April 10, 1962, for example, the Edmonton Public School Board heard a presentation from a private citizen who held the position of Executive Director, Boy Scouts and who is presently the Manager of the Housing and Social Services Department, City of Edmonton. Prior to his appearance before the Board, he wrote to 150 organizations, community leagues, home and school associations, recreation clubs and other interested parties in the City of Edmonton and shared the content of his presentation. The presentation contained several observations regarding the use of school facilities after school hours. He argued that the school boards' policies regarding community use "brought about, indeed forced, the erection of almost duplicate facilities within a short distance of existing schools (community halls and recreational facilities)" (A letter to the Edmonton Public School Board from a private citizen, March 20, 1962). The letter expressed support for informal education activities for young people and adults and indicated that there was a growing recognition across the country of the absolute necessity for better use of school facilities. The writer stated that since schools were normally located in the centre of a neighbourhood and were kept heated, it was a waste of public funds to duplicate facilities in the form of constructing community centres on the same grounds. He suggested that a committee be set up composed of representatives of responsible community groups in order to study the

issue of community use of school facilities (e.g., which facilities would be used, rental rates) and further suggested that a policy be instituted by the board requiring incorporation of multi-purpose facilities in every new school plant erected. The Board approved the formation of the committee and supported the desire to better utilize school facilities.

The need to enhance community use of school facilities was also supported by another committee established two years later by the Mayor to deal with recreation issues. This city-sponsored committee had the following to say about the community use of schools:

Consideration should be given immediately to a closer liaison with the School Boards in the City of Edmonton. Many potentially useful facilities owned by the School Boards are lying idle for much of the time. These facilities could be put to good use by community leagues and the (City's) Parks and Recreation Department. This may require some legal work and some diplomacy but the matter should be pursued, otherwise there may well be more unnecessary and expensive duplication of facilities. (City of Edmonton, Committee on the Community Use of Schools, April 27, 1964)

Interest in the issue of community use of school space had also been expressed by the Edmonton Welfare Council, a citizens' planning organization concerned with the provision of human services such as welfare, health, education, recreation and corrections - all requiring physical space to undertake many of their programs. In November 1964, the Welfare Council presented to the Edmonton Public School Board a brief in which it expressed concern with the lack of utilization of school facilities by community volunteer organizations and strongly objected to the Board policy which appeared in the district's rental regulations and read as follows:

School buildings and grounds are constructed and maintained primarily for the education of the school children of the Edmonton School District, and therefore no use shall be made of the buildings and the grounds which will interfere with their

most effective and beneficial use for school children.

The brief contended that the above policy statement did not reflect the desire of the citizens of Edmonton and stated that:

It is our feeling that a new approach, a new policy, should be developed in this city wherein the school facility is viewed as a total community resource. As such, school buildings would be utilized not only for formal educational purposes but as centres of community activity embracing the community league movement, adult education, youth programs, active and passive recreation and group activities. It is our feeling that such an approach would more accurately reflect current public opinion on the community use of schools. (Edmonton Welfare Council, Brief on Community use of School Facilities, 1964, p.2)

It is significant to note that there is evidence to suggest that City administrators from the Parks and Recreation Department were involved in the preparation of this brief. A search in the City Archives revealed a memorandum attached to the second draft of the brief which clearly indicated that a senior official in the department had provided comments during the preparation of the document.

The Context

This section focuses on community-oriented programs in the Edmonton Public School District as well as on the activities and adopted positions of the other parties within the metasystem - the various City departments and the Separate School District - as well as by interested community organizations regarding the concept of community schools.

A number of programs that were in place in the Edmonton Public School District in the early 1970's had a community orientation and fit the framework of the community school concept. They included:

- 1) Commencing September 1970, all high schools introduced work-experience programs through interaction with the business community

2. The Extension Services provided members of the public with an opportunity to continue their education by offering academic and general interest courses in eight schools.

3. The programs for gifted children initiated in September 1970 involved extensive use of community resources.

4. The extent of the schools' use of community resources increased rapidly during the early 1970's through field trips, community improvement projects and the use of volunteer teachers' aides.

5. A number of parent advisory groups were organized during that period as an alternative to the Home and School Association to collaborate with principals and staff in examining local needs.

6. A number of teen drop-in centres operated in schools.

7. The community use of schools grew rapidly during the 1970's because groups could make bookings through the City's Parks and Recreation Department, the School Board's rental office and the Extension Services Branch.

Elements of the community school concept could be found also in activities and programs at the Separate School District. For example, the Separate Board assigned a community school co-ordinator to one of its schools located in the inner city in order to work with community groups within the geographic area served by the school.

Interest in the community school concept was expressed by a number of City Departments. Edmonton Parks and Recreation in their 1970-1980 Master Plan recommended that the Department:

... should continue to encourage the development of community-schools through its association with the Public and Separate School Boards. Community league facilities should be planned as a part of community-school complexes whenever this

Fundamental changes in classroom design may be necessary. Other social services could be planned in conjunction with the community-school buildings at the "Area" level. (Edmonton Parks and Recreation, Master Plan 1970-1980, January 1, 1972, p.23)

The Department recognized the significance of school design to accessibility for community use and made the following observation in the Master Plan:

An objective that has not yet been implemented to any extent, was that all new schools would be planned for maximum community use. There is increasing demand from the community to use school facilities. In the future, schools should be planned and designed as community education, recreation and social service centres. (Edmonton Parks and Recreation, Master Plan 1970-1980, January 1, 1972, p.23)

Other City departments interested in the community school concept included the Social Services Department which identified areas of co-operation in daycares, mothers' groups, family life, counselling, drop-in centres and teen programs and the Public Health Department which showed interest in the use of school facilities for day programs such as pre-natal care, unmarried mothers, group communication and mother's day out programs. Although in many cases schools served the same areas as the public library, and there had been informal relationships between the schools and the public libraries (e.g., field trips had been made to libraries, librarians had visited schools), librarians demonstrated strong opposition to locating in schools. While the "official" explanation was that the clientele was different and the public using the library would not want it to be located in a school, some suggested that the resistance to change reflected professional protectionism among librarians - fear of losing control and power.

The City of Edmonton had placed ~~emphasis on community involvement in~~

limited financial resources available, funds had been directed towards assisting community groups rather than to the direct provision of program services. Such assistance came through the provision of district recreational staff to furnish on-going services to the individual community leagues and through financial assistance for construction and renovation, maintenance and utilities. The Federation of Community Leagues was the representative and co-ordinating body for community leagues in the City of Edmonton. It promoted the community league movement as the primary philosophy and vehicle for community action in the City. The objectives of the Federation included:

. . . supporting any community league or Area Council making direct representation concerning matters of recreational, neighbourhood or social concern to any council, legislative body, department, board, commission or committee at the Federal, Provincial or City level of government. (Edmonton Federation of Community Leagues, President's Manual, 1979, B2-1)

The Federation was concerned about community access to school facilities, and in October of 1972 it passed a resolution that bookings in Edmonton schools for community purposes should be handled by community councils at the school level. The resolution apparently stated that school facilities such as gymnasias and kitchens and their equipment should be available for community use and communities should have access to their schools except from 6:00 a.m. to 6:00 p.m. on school days. The president of the Edmonton Federation of Community Leagues presented the resolutions in a letter to the Edmonton Public School Board stating that the community council should have the right "to establish and enforce regulations for use of (school) facilities during non-school hours" (quoted in the Edmonton Journal, November 27, 1972, p. 23). The president

use of schools by the community and suggested that community councils be made up of representatives of the City's Parks and Recreation Department, the community served by each school and the school principal. The council would handle the bookings and set out the regulations governing the use of the facilities.

According to the document The Community School - A Focus on Living developed by the Edmonton Public Schools' Extension Services Branch, community associations such as the Y.M.C.A., Y.W.C.A., Boy Scouts, Cubs and Brownies reacted positively to the community school concept. The Edmonton Social Planning Council, which was mentioned in describing the setting of the case study in Chapter Four, supported the concept in principle. It believed that schools and other social agencies needed to act as animators in the social process and that people have to be equipped with appropriate skills to bring about desired change. The Council's administration had the following reservations regarding the proposed concept: (a) the community might become subservient to the schools; (b) school personnel, by and large, have limited knowledge of community development and its potential, and (c) within schools, laymen had become too dependent on educators and the extension of this dependency would do little to alleviate existing social problems. (Edmonton Public Schools, The Community School - A Focus on Living, 1971, pp.29-30)

The Edmonton Social Planning Council was involved in promoting the community school concept. It supported an open forum on community schools which was sponsored by the Human Development Services Consortium, and was associated with the Council (Edmonton Journal, March 7, 1972)

community schools in the 1971 school board election. The Council formed a committee which studied the feasibility of community schools for some time before the election and decided to highlight the desire to have a closer liaison between each school and its community during the election campaign. The advertising of a slate of public and separate board candidates supported by the Council drew strong criticism from incumbent trustees, some of whom claimed that since the Edmonton Social Planning Council was a member agency of the United Community Fund, money donated by the general public for charity was being used for political purposes. These trustees used the media to urge the United Community Fund to stop sponsoring the Council (Edmonton Journal, June 21, 1972, p.43). The Acting Director of the Edmonton Social Planning Council, who later became an alderman and now serves as a member of the provincial legislative assembly, responded through the media suggesting that many of the Social Planning Council's involvements were political. She was quoted as saying that "social action and social change are political, although in a non-partisan sense. Many of the things we are involved in could be described as being political" (Edmonton Journal, June 21, 1972, p.43).

The Council's defence was that it was supporting an idea and was attempting to increase public understanding of the concept of community schools and awareness of which candidates supported the idea. Two letters to the editor on this issue were published by the Edmonton Journal on July 5, 1972. One argued that the expenditure of monies received from the United Community Fund for political purposes was highly improper, if not actually illegal, and urged the United Community Fund executive to reconsider the allocation of donations received and perhaps exclude the Edmonton Social Planning Council entirely. Another letter

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supported the Council's action. The writer suggested that if political action was necessary in order to bring about educational change, than the Edmonton Social Planning Council was justified in endorsing school board candidates who, they believed, would work for beneficial change in education.

Community Use of Schools During the Early 1970's

The Parks and Recreation Department provided support to community groups which developed a drop-in centre and a teen centre in schools where youngsters could get together after school hours. At Hardisty School, where one of the two centres was located in the late 1960's, problems occurred with respect to its operation. It was established as a meeting and socializing place where young people could go rather than meet in shopping centres and become involved with alcohol and drugs. The concerns expressed in interviews as well as in Public School Board meetings were that "wild" parties took place at Hardisty School. It was claimed that some youngsters had driven a motorcycle in the building and that physical education equipment had been damaged. A trustee who opposed the continued operation of the centre suggested in a Board meeting that the overtime costs for the operation were high, that vandalism resulted in considerable damage to the school and interfered with the instructional program, and that residents were trying to sell their homes but could only do so at a loss. A number of individuals interviewed during the study verified that there were behaviour difficulties in the after-school activities at Hardisty and that they suffered from lack of appropriate supervision.

Residents appeared before the Board and complained about young people littering the streets and properties in the area and about liquor being consumed around the school. A variety of suggestions were proposed including:

1. The improvement of supervision through the involvement of school staff instead of leaving the program administration to Parks and Recreation and the local community committee;

2. The transfer of the program to a high school located in the general area where there was more room and surrounding open area, and houses were not as close to the school, and

3. Limiting the participation to residents from the local area.

It was argued that the provision of drop-in centres for the entire city was not the Board's mandate but rather the city's responsibility. Two trustees suggested that in order to solve the main problem of community use of schools, accountability, control and the possibility of bringing a large segment of the Recreation Department under School Board control should be explored. This would enable better co-ordination of educational and recreational services.

The Board position regarding community use of schools at that time was expressed in a recommendation which was unanimously approved in the April 28, 1970 Board meeting following a discussion on the problems and possible solutions associated with the Hardisty program. The approved recommendation was that:

The Board accept in principle the community school concept whereby schools would be used for community purposes, with programs being co-ordinated or directed by a school administrator; service groups such as the Y.M.C.A./Y.W.C.A., community centre groups, and community leagues would be involved and would participate in programming, as would the Parks and Recreation Department of the City. The Board (will) enter into negotiations with the City to determine how the

community school concept could best be put into effect, (and) . . . such negotiations (will) include the Edmonton Separate School Board. (Edmonton Public School Board, Minutes, April 28, 1970)

Trustees of the public school system were suspicious of the City Parks and Recreation Department's desire to have the drop-in concept expanded in the City. The Board rejected its administration's recommendation that the two community programs be permitted to continue during the summer of 1970 and that the programs be extended to include six additional schools, with guidelines being established by the Parks and Recreation Department and a local committee providing direction and supervision. Trustees, in rejecting the recommendation, emphasized that the request to expand the programs did not come from the respective communities but from Parks and Recreation and argued that guidelines for operating summer programs should not be set by the Parks and Recreation Department if the Board wished to maintain control.

Two weeks later, the Board approved the continuation of the previously approved two centres provided that they would operate according to policies and regulations established by the Edmonton Public School Board and that there would be adequate supervision of the school buildings and grounds. The Board further directed the Extension Services Branch of its administration to examine the feasibility of implementing a community use of schools concept within the inner city.

Support at the local school level was perceived as a key variable in the success of any effort to bridge the gap between the school and the community. At Hardisty, there was strong support for the community school concept. A letter from the school principal to the Associate Superintendent Educational Administration dated April 1, 1971 revealed that, in addition to the advocacy of the concept by the principal, there

were active Home and School Associations, Community Leagues, churches and a Community Co-ordinating Committee which brought together representatives of various groups. The letter contained a number of requests which included: (a) establishing a team from the Bureau of Child Study at the school; (b) appointing a Community Co-ordinator; (c) relocating one of the portable classrooms closer to the school building, and (d) facilitating the establishment of a local human services site. With regard to the last request, a similar but more extensive attempt to integrate human services at the local level is reviewed and analyzed in Chapter Seven in a section entitled "West-10: An Experiment in the Co-ordination and Integration of Human Services at the Local Level." In his letter, the principal requested that:

. . . in conjunction with the Department of Social Services, (City of Edmonton) Parks and Recreation Division (City of Edmonton) and the Department of Social Development (Provincial Government) the establishment at this school of at least desks for representatives of these organizations. Offices would be more valuable. This would place many of the services which are now available to the school and the community in close proximity rather than being scattered at various points throughout the city. It would make conference arrangements much simpler and would expediate case handling. (Letter from Hardisty Principal to Associate Superintendent Educational Administration, April 1, 1971, p.2)

Evidence that Hardisty had an active local community group was found a few years later when the Hardisty Community School Steering Committee requested special provincial and district financial support for field trips. Parks and Recreation was under financial constraints and did not offer support. The Provincial Department of Advanced Education was reluctant to provide extra funds and the School Board had to consider the request in relation to the needs in all its schools. The Superintendent's reply to the Committee stated that:

The incidence of local field trips and extended travel programs has been increasing dramatically over the past few years in schools throughout the system. We have investigated the problem of funding and, at this time, question whether the solution lies entirely in the provision of additional funds. To provide the amount that you have suggested (\$130.00 per class) would be impossible on a system basis within our present budgetary framework and practices. Since field experiences have become an integral part of the program in most Edmonton Public Schools, it would be difficult to defend the provision of additional funds at Hardisty alone. (Letter from the Superintendent, Edmonton Public Schools, to the Chairperson, Hardisty Community School Steering Committee, August 14, 1974)

By that time, some of the controversy regarding community schools and the summer use of schools had been settled. The Board maintained its authority which included controlling all activities within school buildings, ensuring that such activities did not interfere with the operation of the regular day-time education of children and minimizing the shift of educational dollars to the provision of services perceived to be outside its mandate.

The 1970-71 Community Schools Pilot Project

On June 9, 1970, the Extension Services Branch of the Edmonton Public School District was directed to coordinate the community school pilot project, formulate a community school concept for the Edmonton Public School District and recommend for Board consideration the degree to which the concept might be implemented in the Edmonton Public Schools. A consultant with expertise in the field of community schools, who had previously been employed by the City's Parks and Recreation Department, was appointed for a one-year term to assist in the development of the district position.

The pilot project was established in order to obtain first-hand information and experience with community schools under field conditions.

Two schools were selected: a new composite high school which had few established community-school procedures and practices and an older, well-established elementary-junior high school located in the inner city. Prior to the implementation of the project, the idea was discussed with the school principals and with their staff. In addition, it was communicated to the Superintendents of the City's Departments of Social Services, Parks and Recreation, Health and Public Libraries. Steering committees were established. They were chaired by a school person, and Parks and Recreation's Area Recreation Directors served as the secretaries on the committees. The committees were responsible for initiating programs, optimizing interaction among various parties, identifying community needs and desires, analyzing problem areas, evaluating the project and suggesting policies and procedures for the future extension of the concept in the Edmonton Public School District. Emphasis was also placed on: (a) provision of information on program opportunities and the community school concept to both the school staff and the community; (b) stimulation of interaction between the school and the community; (c) accommodation of community requests to use school facilities, and (d) encouragement of school staff to utilize community resources in the instructional programs.

The introduction of the project in the two designated schools brought about the decentralization of the facility booking procedures to the local level and increased involvement of both school personnel and community groups. As a result, a wide range of programs was accommodated in the two schools. Observations following one year of operation suggested that an open, receptive climate was necessary to encourage the exchange of ideas and opinions between community members and school

personnel, and that a structured relationship between the schools and the Parks and Recreation Department at the field level was a significant factor in achieving the recreational objectives of the community school (Edmonton Public Schools, The Community School: A Focus on Living, 1971, p.45). With regard to implementation of the concept across the City, it was suggested that an individual approach would be required based on local conditions, needs and resources and that the concept would have to be adopted as a system philosophy and accepted by the school personnel if the project were to extend beyond the pilot sites.

A Framework for the Comprehensive Implementation of the Community School Concept in Edmonton

On the basis of the pilot project experience and other sources of information, the Extension Services Branch prepared a proposed framework for the implementation of the concept in Edmonton. The framework was presented in a document entitled The Community School: A Focus on Living prepared in May of 1971.

The document suggested that individual and societal needs were a reflection of the social, economic, cultural and scientific milieu of the time. It stated that:

The sheer magnitude and velocity of social change characterized by the Woodstock phenomena, transient youth, anti-war demonstrations, Women's Liberation groups, organizations of minority groups indicate that the concern for societal institutions is diffused throughout all segments of society and is not solely directed at schools. (Edmonton Public Schools, The Community School: A Focus on Living, 1971, p.3)

On this basis, the document suggested that the strategies employed to overcome educational problems could be applicable to other problems, and that collaboration in the provision of service was therefore vital. The report questioned the approach of focusing on curriculum, organization

and methods alone if the failure to meet the needs of the child stemmed from environmental factors external to the school. It called for a co-operative effort on the part of all social agencies to look beyond their organizational structures for solutions, and argued that the school should take the lead and not be "an isolated academic village that is in a community but not part of it."

Examples of experiences elsewhere were reported to support the proposed framework. It was suggested that, in New York, districts were responsible for addressing the educational needs of their residents and for promoting coordination in the planning of health, recreation, social, welfare and other human resource programs in the City. In Florida, the Community School Act which came into effect on July 1, 1970, emphasized the extension of traditional school services and included matching grants to boards initiating community school programs.

The report clearly differentiated between community use of school space and the community school concept. The former was limited to making some school facilities available for community use, provided that this did not interfere with regular school activities. The community school concept on the other hand was perceived as a form of integration of the school with the life of the community. The community use of schools was perceived as only one aspect of the more comprehensive community school concept which would use the community as a laboratory for learning and involve laymen in school policy and program planning. Furthermore, the community school would consider as its responsibility the provision of educational programs for the school and the community as well as the provision of the leadership necessary for the mobilization of resources in fostering programs to meet the emerging needs of the total community.

The proposed approach emphasized a curriculum centred on life experience, an extensive use of community physical and personnel resources, a meaningful parental involvement and an educational system based on need rather than age. The life-long education concept was also supported by the Commission on Educational Planning which is discussed in Chapter Seven. The case for life-long education was made in the following way:

Education must be conceived as a continuing process rather than something with a beginning and an end, something which is a continuing part of life rather than something which is preparatory for life. If education is accepted as a life process, then all life experiences must be considered educative. Learning, then, takes place in myriad forms, places and times and the relevance of school experience must be measured in terms of individual growth rather than in grades, certificates and diplomas. (Edmonton Public Schools, The Community School: A Focus on Living, 1971, p.16)

The recommendations presented by the Extension Services Branch for the future development of community schools in the Edmonton Public School District may be divided into three major areas: curriculum design, social improvement and first-hand learning.

In order that the curriculum would be life-relevant, it was recommended that: (a) curriculum decisions be made at the local school level; (b) lay advisory committees to schools be established on a continuing basis; (c) curriculum development offer a measure of flexibility, and (d) curriculum design be based on the learning growth of the individual.

Recommendations aimed at social improvement were that: (a) lay advisory committees to schools be established; (b) schools be used by the community year-round; (c) instructional material be available to the community; (d) school design be flexible in order to enhance community

use of the facility, and (e) the budget process be decentralized to the level most competent to make budgetary decisions.

Recommendations which addressed the acquisition of first-hand learning experiences reflected such aspects as: (a) movement of students through differing environments; (b) differentiated staffing; (c) the entire community was regarded as potential instructional personnel; (d) flexibility in scheduling; (e) personalized instruction, and (f) pupils involved in the selection of resource materials.

A brief review of the context in which these recommendations were made puts the proposed approach in perspective in relation to other activities within the school district and the City as a whole.

Obstacles to the Adoption of the Community-School Concept

This section focuses on obstacles that hampered the implementation of the proposed community school concept in the early 1970's. Firstly, elements in the system that stood in the way of such change are identified and secondly the position of trustees with regard to the change is presented. An example of the conflict between supporters of the community school concept and the Board of Trustees of the Edmonton Public School District is used to illustrate the respective positions. The example used is that of the summer use of school facilities by the community.

Several characteristics of the education system created obstacles to the implementation of the community school concept:

1. There were no special funds to cover the added expenditures. School boards received funds primarily for the 'conventional' daytime education of persons under the age of 21, a fact which prevented school

boards from significantly extending their services and enhancing community use of schools. Furthermore, the regulations governing provincial capital funding were restrictive with respect to the design of schools for community purposes.

2. Regulations under the Joint Use Agreement which reflected School Board policy, restricted the community use of schools by prohibiting the consumption of alcohol and involvement in games of chance on board property. Furthermore, the regulations limited the hours and months during which schools could be used.

3. The education system was (and is) generally based on the teaching of core subjects and approved options through conventional methods, mainly within the school building. The opportunity for developing the curriculum locally and providing students with learning experiences outside the classroom - both significant elements in the community school concept - were restricted.

4. There were no shared or agreed upon definitions of the roles, objectives and concepts among the organizations and agencies delivering human services. As a result, each perceived itself as having responsibility for only one part of the total community needs with little regard to other services. Vested interests and fear of reduced autonomy served to inhibit coordination and integration of resources and services.

5. The fact that regional boundaries for the provision of different services in the City were not coterminous made the coordination of services more difficult to achieve.

The decision as to whether to support the recommendation that the district accept the concept of the community school as an integral part of the educational philosophy of the system and support its

implementation had to be made by the elected officials. They never actually approved the proposal as a whole, although elements of the concept have indeed been implemented throughout the years.

Trustees were concerned about extending the provision of services beyond their mandate and worried that lack of sufficient funds would jeopardize their main responsibility - the education of children. The community school concept required schools to become more responsive to the needs of the total community and to extend services to all people throughout the day and the year. Furthermore, the social improvement purpose, the life-centred curriculum, the emphasis on 'first-hand' learning experiences and the coordination of community forces suggested major changes in many facets of school administration. Most trustees were not prepared to accept such sweeping changes for fear of loss of control and autonomy and of jeopardizing their primary responsibility to the education of children. Trustees did not want to go back to the public which had elected them and declare that children were not being provided with the best education possible. Therefore, they protected the funds available for education and ensured that they were spent for this purpose.

During the discussion of the administration's recommendations presented to the Board of Trustees on May 9, 1972, the Superintendent emphasized that, "The biggest problem that will be encountered will be money, i.e. who should pay the additional costs associated with community use of schools." A trustee who was perceived to be a strong supporter of community schools stressed during the discussion that "the use of schools by outside groups does result in extra costs to the Board and we must ensure that the educational program is not adversely affected by these

expenditures." A newspaper article claimed that she had stated that the School Board could not afford the extra costs associated with community use and that more money would have to be provided from provincial sources or other agencies (Edmonton Journal, May 10, 1972, p.69). A trustee who opposed the implementation of the concept in the Edmonton Public School District shared the concern over cost stating that:

Most of the problems presently being encountered arise from the lack of money on the part of both Parks and Recreation Department and the School Board We might get "tied into" a project such as this (Community Schools) at great cost to the Board and, at the same time, lose control over education. (Edmonton Public School Board, Minutes, May 9, 1972, p.11)

This trustee was quoted a day later in the Edmonton Journal as saying that he was worried because:

. . . many individuals and groups feel that because the schools are tax-supported, they should be available any time. They don't realize schools exist to educate children The Board could lose its identity if it joins other social agencies to provide centralized facilities. (Edmonton Journal, May 10, 1972, p.69)

On June 20, 1972 the Board took a position on a number of elements of the community school concept. During the discussion that preceded the approval, it was argued that integrating community school services could short-change education and that the many demands placed on school boards could result in the diversion of money from education to other services.

The following board position was subsequently approved:

A. Community Use of Facilities

- I. That the Board encourages the community use of designated school facilities to the extent that funds are available, either directly or indirectly, in addition to those funds allocated to the regular day program.
- II. That the Board supports the intent of the Joint Planning Agreement with the provision that immediate negotiations be undertaken with the other parties to the Agreement to ensure that revisions are incorporated which would resolve

concerns which have emerged subsequent to the drafting of the original agreement.

B. Use of Community Resources

- I. That the Board recognizes and supports the use of physical and human community resources as an integral part of the educative process.

C. Community Councils

- I. That the Board encourages the establishment of community councils where parental interest is evidenced.
- II. That the Board encourages the decentralization of decision making responsibility consistent with Board policies.

D. Coordinated Delivery of Social Services

- I. That the Board encourages increased cooperation with the coordination among related social services to better meet the educational needs of the community.
- II. That the Board explore the possibility of establishing agreements with related social agencies (provincial/civic) to develop a more coordinated delivery of social services.

(Edmonton Public Schools, Minutes, June 20, 1972, pp.4-5)

This position formed the general framework for implementation of the concept in Edmonton Public Schools - a concept which was significantly more limited than the proposal made by the Extension Services Branch in its document The Community School: A Focus on Living. The introductory paragraph to the board position clearly identified the priority given to educational services and the condition for implementing the concept, which was the enhancement of the over-all effectiveness of the day program.

The board support for the establishment of community councils was limited to locations where parents had demonstrated an interest. Trustees rejected the provision of decision-making power to any parent or community council and insisted that school principals control the activities within the school in accordance with board policy. The board

minutes make reference to a trustee comment on this matter. He expressed the view that:

Schools should be run by the principal without interference. His role should be defined. The principal can work with parents to build up a good relationship but he should not permit the school to be run by parent committees. (Edmonton Public Schools, Minutes, June 20, 1972)

Guarding against the transfer of decision-making power beyond the Board's realm of control was a concern associated with the establishment of community councils as indicated in Chapter Seven which discusses the School Board reaction to the recommendations of the Commission on Educational Planning.

With regard to coordinating the delivery of social services, the Board offered limited commitment. It agreed to encourage activities that might better meet the educational needs of the community and to explore possible agreements with social agencies to develop a more coordinated delivery of social services. Trustees approved the proposed framework on June 20, 1972 by a five to two majority. In opposition to the recommendation it was stated that educational dollars must not be used for activities beyond the Board's responsibility. A trustee who voted against the recommendation indicated that, while he could support part of the framework, he strongly objected to involving social agencies in the schools. In support of the recommendations it was stated that they would lead to closer cooperation between the community and the school and avoid duplication of facilities. The debate over the recommendations was concluded by a trustee who stated that, in spite of lack of policy on community schools, several aspects were being implemented and therefore, "it is best to adopt a policy to control these changes rather than let them grow uncontrolled."

The positions of the Public School Board and the interest groups that supported the community school concept are illustrated below using the controversy over the community use of schools during the summer months.

Summer Use of Schools

The following example of the summer use of school space illustrates the nature of the community demand for the use of school facilities and the School Board's reaction in maintaining its boundary of control. The example also permits the examination of variables considered in the process.

A community school described by the Extension Services Branch of the Edmonton Public School District as a total opportunity centre for young and old, operating virtually around-the-clock, around-the-year, was not implemented in the Edmonton Public School system. Moreover, the demand to extend the community use of school facilities over the summer months was ultimately rejected by the Board.

Following the special approval of summer use of schools granted by the Board in 1970 to the drop-in centres at Hardisty and Rosslyn Schools and the introduction of the two community school pilot projects, demand for community use of schools for the summer of 1971 increased. On June 15, 1971, representatives of two schools located in the inner city appeared before the Board on behalf of the parents, residents and other groups connected with a proposed community project. Their request was for the use of two schools during the summer months. One of the schools was the district's pilot community school project while the other was considered an extension of the pilot project. The detailed request described in the minutes of the board meeting stated that:

The specific requests included use of audio-visual equipment, tables, physical education equipment as well as industrial arts and home economics equipment. Also requested were spaces, including a room for a coordinator, use of industrial arts and home economics rooms; storage space in classrooms and a separate storage area with a sink, cupboards and furnishings for general community property; additional locker space and storage space in the gymnasium; an additional room for the use of agencies connected with the project; and a further space to accommodate social requirements of the community during and after regular school hours. Other recommendations were that custodial services be provided when required; school bookings be delegated to the schools and an approach be made to the City of Edmonton to provide a community school coordinator, who would than require a separate office in the school. Particular emphasis was placed on the recommendations for use during the summer vacation and holiday period, provision of necessary custodial services, inclusion of Norwood School in the Spruce Avenue Community School project, and provision of a specific room and telephone for a community school Coordinator. (Edmonton Public School Board, Minutes, June 15, 1971)

During questioning of the representatives, it was revealed that trustees had a number of concerns regarding the request:

1. The Steering Committee had only a few residents on it. The majority of the committee consisted of school personnel and groups and agencies in the city.
2. The fact that the Committee was working closely with the Parks and Recreation Department was of concern since trustees believed that this department was interested in extending the community school concept across the system, widening the community involvement in school operation and increasing the Board's contribution under the Joint Use Agreement.
3. The costs associated with the request and its possible extension to all 140 schools in the system were of concern.
4. The services to which the Board was expected to contribute went beyond the realm of education - their main responsibility.
5. Loss of control over activities in the school was a major worry. One trustee sensed that "the group wished to 'run' the school."

The response to the delegation came a week later in the form of a unanimously approved motion which consisted of the following three points:

1. The Board redefined that free use of school buildings during the summer vacation periods was not part of the Joint Planning Agreements with the City of Edmonton Parks and Recreation Department.
2. With the exception of certain experimental and pilot programs specifically authorized by the Board, a rental fee would be charged to all groups using school buildings during the summer vacation period.
3. Unless specifically authorized by the Board, the use of school supplies or equipment other than chairs, tables and gymnasium equipment would be restricted to the educational programs operated by the Board through its regular programs and extension services.

(Edmonton Public School Board, Minutes, June 22, 1971)

The board interpretation that their commitment under the Joint Use Agreement was limited to a ten-month period brought about a strong response from the Parks and Recreation Department, which took the position that the Joint Use Agreement applied year-round. The Department's Assistant Superintendent in a letter to the Board's Deputy Secretary Treasurer strongly objected to the Board's charging for summer use and accused the board's administration of consistently jeopardizing the intent of the agreement while, at the same time, making extensive demands for the development and maintenance of school grounds. When the letter was brought to trustees' attention, most of them voiced the opinion that the policy of co-operating on the community school concept was subject to available funds and since there had been a significant increase in the use of schools, the Board needed to concern itself with the protection of funds available to education.

The third point reflected a controversy over the use of school gymnasias and equipment. A number of schools requested extra and more frequent replacement of selected equipment and supplies such as balls, and many teachers were reluctant to offer teaching stations such as home economics, science, art and industrial arts spaces for community use during the year. An interview with a former senior administrator with the Edmonton Separate School District revealed that a similar phenomenon was also evident in that system. The teaching staff was extremely upset about sharing specialized instructional areas, and therefore spaces such as home economics and science rooms were not made available outside the regular education programs. The feeling that the City's Parks and Recreation Department was attempting to create a demand for school space and was requesting Boards to accommodate any size of group brought about some resentment by the Separate School administrators (e.g., the need to open and pay custodians overtime in order to accommodate five individuals who wanted to practice basketball). Additional complaints were received regarding damage to the gymnasium floors and the demand for custodial overtime resulting from community use of schools.

An interest group that was involved in the controversy over community use of schools was the Edmonton High Schools Athletic Council (E.H.S.A.C.) which consisted of administrators and department heads who governed the interschool athletic program in the City. This powerful group wanted to ensure the availability of the gymnasias and the required equipment for all its activities. The location of some of the activities could not be determined in advance and on occasion they conflicted with previous community bookings. This was a strong lobbying group that

communicated to senior administration and the trustees their reservations regarding the extent of community accessibility to school facilities.

The issue of summer use of schools did not disappear and a year later the board was again under pressure to extend the number of schools available for summer use. Trustees in general supported the maximization of the use of school buildings provided that the additional costs did not detract from the educational program. Another point that was made by a trustee who supported the concept of community schools and who later was elected to City Council was that a policy had to be established to guide the Board and the administration on this matter instead of dealing with the issues on an ad hoc basis. The board minutes summarized her statement in the following way:

It is incomprehensible that the Board should be dealing with administrative detail before developing an overall policy. We have 'pilot' projects that will go on forever unless a policy is adopted. The Board of Trustees is a policy-making group and if it is unwilling to face the problem it will be 'hiding its head in the sand.' We should not continue to operate on 'stop-gap' measures. (Edmonton Public School Board, Minutes, May 23, 1972, p.20)

Summary

This section demonstrated that there was significant support for improving community access to schools and for the community school concept which was perceived as a form of integrating the school with the life of the community. The support did not come only from community groups and City departments but included also segments of the Public School Board administration. A report presented by an administrative branch suggested that since strategies employed to overcome educational problems could be appropriate to the resolution of other problems, collaboration in the provision of human services was vital. The report

called upon organizations and agencies to look beyond the organizational structure or solutions and advocated that schools should become part of the community.

Despite the reports and presentations in support of implementing the community school concept in Edmonton, the Public School Board resisted the requested changes in favour of protecting its vested interest - the education of children. As illustrated, trustees were concerned about extending the provision of services and were reluctant to "spread" the educational dollars to include services beyond what they perceived as their mandate. They also rejected the proposal to establish community councils with decision-making powers over any aspects of school operation, including the use of schools after school hours. They insisted on maintaining control through the local school principal.

Consumption of Alcohol on School Property: Conflict Within the Metasystem

Introduction

The policy controversy regarding the sale and/or consumption of alcoholic beverages on public school board property, which was a major factor in the City's desire to review the Joint Use Agreement, is analyzed in this section in order to gain more insight into factors affecting the evolution of the agreement. In addition, the analysis sheds some light on the applicability of the conceptual framework proposed for this study. The analysis of this conflict also illustrates elements associated with boundary maintenance activities and reports findings related to interorganizational relations and the interaction within a metasystem.

The specific case deals with the attempt by a community league, with the support of powerful groups and individuals such as City Aldermen, City administrators and the City's Federation of Community leagues, to alter a school board policy which prohibited the sale and/or consumption of alcoholic beverages and the engagement in games of chance on school board property. This attempt occurred in the City of Edmonton between 1971 and 1974 and was resolved following a plebescite on October 16, 1974. It should be noted that, throughout the debate, reference was made to the existence of a board "policy" on this issue. In reality, there was no such policy and the practice of prohibiting alcohol consumption on board property stemmed from a regulation on this matter. Furthermore, the main controversy was over the consumption of alcohol rather than with the use of the facility for bingo games. Following the results of the plebescite, on November 12, 1974, the Board approved a policy which stated that:

The Board prohibits the sale or consumption of alcoholic beverages on all school premises. Further, the purchasing of liquor permits in the name of a school or any school authorized group is prohibited. (Edmonton Public School District, Board Policies Manual, JGB)

Background

The Edmonton Public School District tried a new concept in school construction in the early 1970's. It consisted of building community wings attached to the school facility. Two new schools, Evansdale and Thorncliffe, were constructed at that time and the 'community wing', which included a meeting room, dressing rooms and equipment storage room, was part of each project. The gymnasium and the outdoor hockey rink were located in close proximity to the dressing rooms in order to make it

convenient for the community to use the school facilities after school hours. While it was expected that the City would pay for the construction of the wings, there was no formal agreement that stipulated that the title for the property would be transferred to the City nor whether the school boards' policies and regulations would apply to the community wings. When the School Board decided that its regulations would apply to these facilities, the communities strongly objected to the regulation which prohibited the consumption and sale of alcoholic beverages on school property and the engagement in games of chance in its facilities.

For lack of alternative options, (there were no other public facilities in the neighbourhoods), the communities decided to voice their dissatisfaction. This action supports Aldrich's (1979) suggestion that a client or a customer dissatisfied with organizational performance is more likely to leave if other alternatives exist. However, a lack of feasible alternatives increases the likelihood that 'voice' (expression of dissatisfaction) will be chosen by discontented customers. This case could provide further insight by suggesting that the higher the socio-economic status of the customer(s), the more likely that the dissatisfaction will be expressed. Community members from higher socio-economic classes are likely to know the political process and express their views in a more eloquent way. This observation is based on the school closure experience in Edmonton and is evident in the case of the two community wings attached to Evansdale and Thorncliffe Schools.

The Evansdale and Thorncliffe communities had contrasting neighbourhood profiles. The Evansdale neighbourhood, located in the Northmount Community, consisted of a large proportion of single-family

dwellings, while Thorncliffe had a relatively large number of multiple-family units (e.g., town homes, apartments), a fact which resulted in that neighbourhood's having a much more transient population. This factor is of interest since it was the residents of Evansdale - the neighbourhood with the higher socio-economic level - who launched a strong campaign to have the 'policy' regarding the consumption of alcohol in schools changed.

The Case for a Change in Board 'Policy'

On March 23, 1971, a delegation from the Northmount Community League and Northmount Parent Advisory Committee appeared before the Board of Trustees requesting a revision of the board's 'policy' in order to allow the sale and consumption of alcohol at Evansdale School. The submission was specific about the conditions under which this would be allowed: it would only be permitted for "adult functions sponsored by an incorporated society, charitable or social group for which a liquor permit had been issued by the Alberta Liquor Control Board" (Edmonton Public School Board Minutes, March 23, 1971). In support of this case, the delegates made the following points: (a) there was no other community league building in the community; (b) the residents would like to make maximum use of the facilities; (c) liquor would attract more residents to community functions, and (d) the matter had been discussed with the school principal and the proposal to the Board had been developed jointly with him.

The Board of Trustees unanimously rejected the delegation's request (April 13, 1971), but the pressure to revise the 'policy' was mounting. A few months later, several community leagues, including Belvedere and

Londonderry, requested that the Board reconsider its 'policy' concerning the sale and consumption of alcohol at adult functions held in public schools. A similar request was presented in a letter from the Chairman of the Parks and Recreation Advisory Board (consisting of elected and appointed officials and including representatives of the City and both School Boards) advising of a motion passed at a recent meeting wherein the School Board had been asked to reconsider its position with respect to alcoholic beverages in schools. In addition, the Edmonton Federation of Community Leagues, the coordinating body between the member Leagues and the Civic Administration, sided with those opposing the 'policy'. (This organization had been extremely influential in the local communities and was perceived to have an impact on civic elections.)

A Joint Use Agreement Review Committee consisting of two elected representatives from each of the three parties - City of Edmonton, Public School Board and Separate School Board - had been established at City Council's request that same year (its first meeting took place on November 16, 1972) to address concerns expressed by the Parks and Recreation Department. Less than a year later, an alderman who was one of the two City representatives on this committee stated that "the problem involving community wings at Evansdale and Thorncliffe was one of the principal reasons the City requested a re-examination of the Joint Use Agreement" (Statement made on June 27, 1973).

During the summer of 1972, the Northmount Community League (also referred to as Evansdale Community League) prepared another assault on the Board 'policy'. The president of the Community League was quoted in the July 12, 1972 issue of the Edmonton Journal as saying that they had a community hall (the school wing) that could not be fully utilized,

whereas other community halls across the city could be used for adult functions where liquor was served.

The summer activities included the collection of signatures on a petition which provided background information and listed eight recommendations related to community access to the facility. The results of the survey, which were presented to the School Board at a meeting on August 29, 1972, suggested that over ninety-six percent (96%) of the 900 homes that had been approached supported the brief in its entirety. The brief also proposed a one-year trial use of alcohol at Evansdale School. In accordance with the policy that the board decision on a petition would be made two weeks following the delegation's presentation, the decision was scheduled for September 13, 1972. In the meantime, the community league organized what the Edmonton Journal called a "pop'n cheese party in booze ban war" (September 7, 1972). An early afternoon meeting was arranged for the convenience of school trustees, board administrators and city officials. During the 'party', the president of the community league was quoted as saying that they had been told that the gymnasium would be their community hall and that they were presently unable to use it as such. The local cause received support during this 'party' from City Aldermen, Parks and Recreation administrators and a representative of the Edmonton Federation of Community Leagues.

One alderman was quoted as saying that the wing "was built for community purposes . . . and determination as to its use should be up to the community" (Edmonton Journal, September 8, 1972), while another suggested that this unique case deserved special regulations. The Director of Community Programs, Parks and Recreation, proposed that the City pay the cost of constructing the community wing (\$62,000) and

receive title to the property. This would mean that liquor could be served since it would no longer be school board property. The representative of the Federation of Community Leagues suggested that the League had previously considered joint use developments such as Evansdale but had always feared that this type of problem would emerge.

Support for the community came also from one of the public school board trustees who repeated points made earlier by the president of the Community League. He had described the board stand on liquor and games of chance as antiquated and had said that the policy was unfair to the Evansdale people who utilized the wing and the school gymnasium as their community hall. The facility had been designed to bring the community together but this could not be accomplished under the existing policy. Another point that was made by supporters of a revised regulation was that the Separate School Board (Catholic) allowed the consumption of alcoholic beverages at community functions held in schools after school hours. Although some trustees from that school board objected to the practice, it had continued with little or no difficulty.

When the Evansdale Community League representatives realized that their attempts to persuade the Public School Board to change its 'policy' had failed, they approached City Council for assistance. They wrote a letter to Council and met with its Public Affairs Committee which was chaired by the Alderman who was also the City's representative on the Joint Use Agreement Review Committee. A quote from the Public Affairs Committee report to City Council describes the feelings of the community league's representatives as related to the issue at hand. It stated that:

They explained that Evansdale School has been developed as a community school, with the community wing paid for by the City.

It was understood that the community league would have the same jurisdiction in the wing as it would have in a separate community league hall. However following construction the Edmonton Public School Board insisted that the community wing must operate under restricted regulations set by the Board, thus denying the community league of the expected autonomy. The Evansdale representatives felt that the Board's failure to acknowledge the previous understanding amounted to a lack of confidence in the ability, prudence, maturity and responsibility of the league. The league had hoped that the City would be successful in its bid to obtain title to the wing. However, the Board's recent decision to assume all costs of constructing the wing, thus placing the facility fully under School Board control, has the community league deeply alarmed and worried about its future in the building. (City of Edmonton, Public Affairs Committee Report No.16, October 9, 1973)

The Public Affairs Committee was extremely sympathetic to the community league's cause. It pointed out that the Joint Use Agreement, then being negotiated, did not contain separate regulations relating to community wings, although the problems and uses differed considerably from those of regular schools, and recommended that a schedule be attached to the Joint Use Agreement setting out: (a) regulations for the operation of community wings, and (b) regulations guaranteeing expanded community use of all school facilities, with greater priority given to community leagues for after-hour use of these facilities.

Analysis of the Community League's Policy Argument

Dunn's six elements of policy argument are used here in the presentation and analysis of the community case in support of their proposed revision of the school board 'policy'. Dunn (1981) suggests that every policy argument has the following elements:

1. Policy-Relevant Information: Constitutes the evidence at the analyst's disposal.
2. Policy Claim: The conclusion of a policy argument.

3. Warrant: Assumptions which permit the analyst to move from policy-relevant information to policy claim. According to Dunn, a warrant may contain assumptions of several kinds: authoritative, intuitive, analycentric, causal, pragmatic and value-critical. (Dunn, 1981, pp.67-68)

4. Backing: Arguments that may be used to support warrants which are not accepted at face value.

5. Rebuttal: Is a second conclusion, assumption, or argument that states the conditions under which the original claim is unacceptable, or may be accepted subject to specific conditions.

6. Qualifier: The degree to which the analyst is certain about a policy claim.

Table 6.1 applies Dunn's typology of elements of a policy argument to the information described in the case under study.

The Case for Retaining the School Board 'Policy'

As indicated in the previous section, the Board of Trustees of the Edmonton School District faced significant pressure not only from the specific community which requested a 'policy' change, but, more importantly, from elected officials in the City of Edmonton, a trustee that supported the community position, Parks and Recreation officials, the Edmonton Federation of Community Leagues and a number of other community leagues. What were the Board's policy arguments for retaining the regulation which prohibited the sale and/or consumption of alcohol in schools; and why were trustees prepared to withstand the pressure against their position?

Table 6.1

The Case for a Policy Allowing Consumption of Alcohol in Schools

Elements of Policy Argument	Case Study
Policy-Relevant Information	There was a strong local community support for the use of alcohol at adult functions in schools.
Policy Claim	The sale and or consumption of alcohol on school property should be permitted during adult functions after school hours.
Warrant:	
Authoritative mode	The maximization of community use of public facilities was desirable.
Intuitive mode	Liquor would attract more residents to the facility.
Explanatory mode	Increased resident participation would bring the community together. The school principal's support would ensure a controlled situation.
Pragmatic mode	The separate school board allowed the consumption of alcohol during adult functions.
Value-critical mode	There should be equality among community leagues. Other communities had community halls and generated revenues during functions where alcohol was served.
Backing	Community participation in school operation and bridging the gap between the community and the school was supported by the school board. (Reflects the Board submission to the Commission on Educational Planning)
Rebuttal	The general public would not support the local community's desire and granting the request would establish a dangerous precedent.
Qualifier	Because of the high level of local support (96.4%), there was a high probability that the community at large also supported this position.

Dunn's (1981) context of values, presented in the review of the literature, provides a framework for examining the relationship between individual or group interest and the public interest. The typology includes the following contexts: (a) the personal context consisting of expressions of individual desires; (b) the standard context involving group value statements about particular situations, and (c) the ideal context consisting of value judgements which are not dependent on individual or group desires.

While the position taken by the Evansdale Community League reflected the standard context which involves a group value statement about a particular situation, it appears that many of the arguments of two key trustees in the debate could be categorized under the ideal context: value judgements which are not dependent on individual or group desires. These trustees were able to gain the support of the majority of the trustees towards their stand on the issue using a number of arguments which are described below. The following quotes from trustees' reaction to the Evansdale Community League delegation suggest a strong belief in the rightness of the position taken and in the value judgement that alcohol and education do not mix. Trustees seemed to be jealous of their jurisdiction and prepared to defend it at any cost:

The school is a centre for learning and therefore can not be looked at in the same light as a community hall. Liquor and games of chance could not fit into the philosophy of a learning centre. (Edmonton Public School Board, Minutes, September 12, 1972)

If the schools are not kept as 'holy ground' where children are protected completely and education is their primary purpose, we are 'opening the door' to complete loss of control of these schools. The preservation of schools and any facilities attached to them must be paramount. (Edmonton Public School Board, Minutes, September 12, 1972)

Alcohol and education are incompatible. Schools, rather than being mere buildings, should represent the ideals and goals of education. The activities that take place in a school reflect on that school and the serving of liquor will undermine these goals. (Edmonton Public School Board, Minutes, January 22, 1974)

The goal of education is to stimulate the mind and to clarify the vision, but alcohol does the opposite, it dulls the mind and distorts the vision What people do in their own homes is their business, but what is done in the tax supported public building is a different matter This matter is going to split the school system as well as the community leagues. (Edmonton Public School Board, Minutes, January 22, 1974)

There was a recognition of changes in society. Children were engaged in activities and expressing desires that had not previously been part of the child's environment. A former senior public school board administrator who served the district in the 1960's and the early 1970's described the change in this way:

Former standards and controls were let down. In the late 1960's, there had been changes in the concept of society - growing laxity insofar as youth control is concerned and how adults conducted themselves in front of youth. A bar had to be in each neighbourhood.

Notwithstanding these changes, there was a belief and a strong commitment that education should resist the trend.

Not only was there a concern with the relationship between alcohol and education, but some trustees interpreted the City's involvement on the side of those who supported a change in the 'policy' as a stage in a much larger plan of intrusion into school board activities and authority. The need to protect and defend education, the Board's perceived mandate, and to maintain its authority was evident in the following trustees' statements:

The City of Edmonton has established a trend of trying to 'move in' on school property and, in fact, an Alderman at the Evansdale School last week was urging that alcoholic beverages be permitted in the school. These statements were made despite

the fact that the Alderman must have known her statement was at variance with school board policies The City's request for a review of the Joint Planning Agreement (actual title is Joint Use Agreement) was an attempt to get control of more school property. (Edmonton Public School Board, Minutes, September 12, 1972)

The City, by seeking to renegotiate the Joint Use Agreement, might be attempting to achieve an urban county through 'the back door'. (Edmonton Public School Board, Minutes, September 26, 1972)

City Aldermen should pay attention to City business, and keep their noses out of school board business, says Edmonton Public School Board Chairman The board won't be pressured by Evansdale, by City Aldermen, or by any group. It will simply do the best job it can . . . the reason it was elected in the first place. (Edmonton Journal, October 6, 1972)

One of the key warrants used by trustees in support of the position taken was the continuous support they had received from a variety of groups and the belief that they were serving the interest of the majority as well as acting in the good of education - as indicated in the preceding quote. References to the extent of support for the Board's position were made by a trustee who, according to the board minutes of November 16, 1971, stated that:

He had received many telephone calls all opposing any change in the Board regulations. In addition, a radio 'talk back' program had recently conducted a survey to determine the number of people 'for' and 'against' use of alcoholic beverages in schools. Of 100 telephone calls received, 86 people objected to any change in the regulations and only 14 favoured the sale and use of alcoholic beverages in schools. On this basis (the Trustee) felt that the request to change our regulations should be turned down. (Edmonton Public School Board, Minutes, November 16, 1971)

The Edmonton Area Council of Home and School Associations continuously supported the Board position on the alcohol issue. It should be noted that this Council represented the interests of children and parents in the community while the Edmonton Federation of Community Leagues, which supported the Evansdale Community cause, represented the

interest of the general population in the community. (With the decline in school enrollment and continued population increase in the city during the 1970's, the relative influence of the respective groups may have undergone some changes.) An example of the Council of Home and School Associations' continuing support of the board position was a presentation by the Council's representative on September 26, 1972 which reported that the executive of the organization had passed a motion that they were not in favour of allowing the opening up of their schools for the consumption of liquor in any way, shape or form, and that it would be unfair to the majority of the Edmonton taxpayers if any part of a school building were transferred to the City of Edmonton in order to circumvent the present regulation concerning games of chance and the consumption of liquor.

Reference to additional support was made in the September 26, 1972 board meeting when a trustee stated that "Capilano, Gold Bar, Mount Pleasant and Terrace Heights have voted against the use of alcohol in these facilities." The minutes from the meeting do not elaborate on whether it was the local community league that administered the vote or whether it was an activity organized by other local groups.

Further strong evidence of support for the Board was demonstrated on January 8, 1974 when a Committee of Citizens opposed to liquor and gambling in schools submitted a petition with some 3,000 names of individuals supporting this position. The brief was presented from the viewpoint of the business executive, the professional, the church and the medical profession, and expressed concern with the potential increase in the number of outlets in the City for consumption of alcohol and the cost of alcohol to society.

Additional points made by trustees in support of retaining the policy on consumption of alcohol throughout the conflict period (1971 to 1974) were:

1. Ultimate concern as to whether or not all schools in the city were to be opened for the use of liquor at adult functions regardless of individual community desires (approval in one location would set a precedent).

2. The same regulations should apply to all individuals using the community facility. If students over 18 were to be allowed to consume alcohol in the evening, it might be difficult to prevent them from drinking during the daytime.

3. There would be little control of admittance to functions where alcohol is served.

4. Significant cost increases were likely: higher fire insurance rates, and new expenditures on policing, maintenance and caretaking.

5. School principals were concerned about an increase in the wear and tear on the facility and equipment.

6. The Board should not compete with existing outlets serving alcoholic beverages.

Three trustees criticized the community petition. They suggested that the inclusion of eight other requests that had already been agreed to by the Board tended to 'cloud' the only issue the Board disagreed with: bar services. Furthermore, it was argued that the background information provided to the residents was deceiving the community. The community wing had not been built from the community's tax dollars but from general provincial funding. As a result, the extent of the support in the community (96.4%) was questioned.

Resolution of the Controversy over Consumption of Alcohol in Schools

The mounting pressure on the School Board resulted in a gradual shift in trustee votes as well as in a search for an alternative which would satisfy the community league and its two main influential supporters, the City of Edmonton and the Federation of Community Leagues. The circumstances were described by a trustee who was quoted in the minutes as saying: ". . . we are being pressured by the City of Edmonton through the Parks and Recreation Department and, if they are in favour of liquor, they should be forced to take the responsibility" (Edmonton Public School Board, Minutes, September 12, 1972). During the same meeting, trustees rejected Evansdale Community League's request for "booze and bingo" after school hours by a 6:1 margin. (The first vote in April 1971 unanimously rejected the delegation's request.) The motion to transfer the wing to the City for one dollar and to allow the Parks and Recreation Department to administer the activities was defeated by a 4:3 margin. This occurred despite the proposed provision that if it did not work the Board would retain the right to buy the wing back for a dollar.

Almost a month later an Edmonton Journal article entitled "Stop Meddling, Aldermen Told" made reference to a statement by the Board Chairman that "we can resolve the situation ... if left alone" (Edmonton Journal, October 6, 1972). A gradual shift in the trustees' view on the matter from one of absolute rejection to one of approving procedures which would allow the consumption of alcohol in schools took place over a three-year period. On December 11, 1973, a trustee moved that the following procedures regarding the extended use of community schools be approved:

1. The procedures are applicable to all adult community groups.

2.— The activity is to be discussed with the school principal and a permit for the use of liquor to be obtained from the Alberta Liquor Control Board.

3. The group must be a non-profit, non-political organization (not individuals).

4. Following the principal's endorsement, the forms should be forwarded to the Director of School Operations for approval. (The Director could hear appeals in cases where the principal was reluctant to endorse the activity.)

5. Regular day students, regardless of age shall not be allowed in such functions.

6. Rental charges shall be limited to cover caretaking and maintenance costs (not a flat rate).

7. Priorities of use shall be as specified in the Joint Use Agreement.

The motion was approved by a slim margin of 4:3. Following this decision, supporters of the ban on alcohol in schools started a major campaign to have the decision overturned and called for a referendum during the upcoming civic election. Support for a plebescite was expressed by the Edmonton Area Council of Home and School Associations while a group called the Edmonton Presidents' Intercity Council opposed the plebescite on the ground that it would generate little public interest. The majority of trustees supported the motion. One trustee thought that there was little interest on the part of the general public and that only principals and teachers were still concerned. He suggested that too much time had been spent on this "non-issue" and that a plebescite was the only way to settle the issue. On the other hand, a

trustee who had strongly objected to the consumption of alcohol in schools all along argued that "the whole issue boiled down to one thing - the preservation of the whole public school system" (Edmonton Public School Board, Minutes, August 26, 1974).

The questions approved for use in the plebescite were:

1. Do you favour allowing public school buildings to be used for adult social functions involving sale and/or consumption of alcoholic beverages provided that these functions are held outside of regular school hours?

2. Do you favour allowing public school buildings to be used for adult social functions involving bingo and other games of chance, provided that they are held outside of regular school hours?

The results on the first question were surprising, even for the winners who expected a much larger rejection of alcohol consumption than the 51.69% of the counted votes (excluding spoiled ballots): 42,732 against versus 39,931 in favour. On the other hand, there was a clear preference for allowing bingo and other games of chance at adult functions. Over seventy-four percent (74.7%) answered "yes" (60,484 versus 20,485). Following the vote, the Board approved a policy statement which prohibited the sale and/or consumption of alcoholic beverages during adult functions on school board property.

Concluding Comments

This case demonstrates that Weiss' general framework of policy formulation based on pressure from interested groups as well as officials' perception of the public interest was a key element during the debate on the consumption of alcoholic beverages in schools. It was

evident that selected trustees viewed the issue as being within Dunn's ideal value context: prohibiting the consumption of alcohol in schools was a value judgement dependent not on individual or group desire but rather on a clear perception of what is good for society and education. For them, the duties of the office involved the protection of the interests of education for children and the disagreement could not be debated rationally although they used some rational factors to support their position. Other trustees initially supported the position against alcohol in schools, possibly as a result of peer pressure or a lack of appreciation of the extent of the problem and the public preference. Those who shifted their vote apparently did not see the decision as a value judgement, but as a value statement about a particular situation.

The loyalty to the duties of the office of trustee was reflected in the protection and defense of the interests of education against what was perceived as an intrusion, and, for two trustees, against an attempt to control functions that were within the authority provided to the Board in the School Act.

Summary

This section described a controversy over a Public School Board regulation prohibiting the consumption and sale of alcoholic beverages on Public School Board property and the engagement in games of chance in its facilities. The analysis of the conflict revealed two extreme positions. One position was in favour of the existing regulation, held by the Board of Trustees and supported by the Home and School Associations, churches and a share of the general public. On the other hand, a local community league requested to use a community wing attached to a newly-constructed

school as a community hall where it would have autonomy with regard to the use of the facility. The community league requested the Board to amend the regulation and permit the consumption of alcohol on board property and the use of the facility for bingo. When this effort failed, a different request was made: that the title to the community wing be transferred to the City, thereby circumventing the requirements of the regulation. Support for this position came from City Aldermen, the Parks and Recreation Department, the Federation of Community Leagues, the Parks and Recreation Advisory Board, a number of community leagues and the majority of the local residents. The situation evolved into a 'war' between the education and the community camps. Dunn's (1981) value context and policy arguments typologies were used as a framework for analyzing the respective positions.

The controversy lasted for about three years, during which time the Board gradually shifted its position from an absolute rejection of the community proposal (April 13, 1971) to the approval of procedures which enabled the consumption of alcohol in public schools under certain conditions (December 11, 1973). The community camp 'victory' was short-lived. Less than a year later, a plebescite was conducted during the election of October 1971 and the consumption of alcohol was rejected by a slim margin, although the public supported games of chance at adult functions in schools.

The Controversy Over Land Control

Introduction

The first two sections of this chapter concentrated on events that took place to a large extent during the early part of the 1970's. The

controversy over land lasted during the entire study period and its resolution in 1980 enabled the parties to finally sign the Joint Use Agreement. Two draft agreements approved in June 1973 by the Joint Use Agreement Review Committee and in November 1974 by the two Boards and City Council mentioned that a final approval was subject to resolution of the land issues. This section reviews the positions of the three focal organizations in the metasystem with respect to the acquisition, ownership and disposition of land and presents the arguments in support of these positions. The relationship of the assumed positions to boundary maintenance and preservation of control over the organizations' respective domains are highlighted.

Background

Prior to the 1960's, the school districts in Edmonton purchased land for the purpose of constructing school facilities and held free title to the land. The Subdivision and Transfer Regulations (June 15, 1967) pursuant to the Planning Act stated that when a parcel of land was subdivided, 10% of the gross acreage was to be provided as reserve dedication. Although the municipality was not obligated to transfer any portion of the land from such reserve dedication to school boards, the practice in Edmonton was that the City distributed the reserve land on the basis of 52.5% to the Public School Board, 17.5% to the Separate Board and 30% to the Edmonton Parks Department. (This ratio was later changed to reflect the increasing share of enrollment in the Separate System and became 50%, 20% and 30% to the Public System, the Separate System and Parks and Recreation respectively.) Commencing in the late 1960's, when higher density development became common, reserve dedication

allotments of 10% were found to be insufficient to satisfy the requirements for schools and parks. In addition to the 10% dedication under the Subdivision and Transfer Regulations the municipality could obtain up to 30% of the total land area for circulation purposes. Efficiency in the use of this land enabled the municipality to utilize the balance of non-reserve dedication (30% minus circulation) for parks and school purposes. This balance is called non-reserve dedication. Land needed over and above the reserve and non-reserve dedications was purchased for the Boards by the City, acting as the Boards' land agent. In 1970, about three-quarters of the land owned by the Public School Board was comprised of non-reserve land.

Early Concerns about Specific Land Issues

Ownership of land appeared to be a form of control over activities on the land: the playing fields and the school buildings were considered by the Boards as improvements on the site, and any interference with respect to them was considered as an invasion of the Boards' sovereignty. The Boards' concerns about land issues had been registered even prior to the review of the Joint Use Agreement in 1972. In 1969, for example, in response to a letter from the president of a local community league requesting to lease a portion of the school site for community league purposes, which is normally provided by the City through its Parks and Recreation Department, trustees of the Public School System raised the following points:

1. The Parks Department of the City of Edmonton is trying to remove parts of the school site from the control of the School Board.

2. Leasing part of the site might mean that the site was originally too large or else the operation of the school would be impaired.

3. The ramifications of allowing the construction of community league facilities on school board property could be severe.

The Public School Board's sensitivity over the land control issue was also evident in the response to the introduction of a new Planning Act in 1971 which essentially mandated the existence of a joint use agreement permitting community access to schools if land was to be dedicated for education purposes.

The Edmonton Public School Board was instrumental in the preparation of a brief from the four Boards in Edmonton and Calgary to the Minister of Education. In this letter, the Boards took issue with the provision in the Planning Act that made it possible for municipalities to refuse land to school boards unless an agreement on joint use of schools was in effect. The Boards objected to section 26.1 of the Planning Act (1971) on the basis of its potential financial implications to Boards and the Boards' need to control sites where educational programs were accommodated. The section quoted below was also used as an argument to support the Edmonton Public School Board's position that the City need not put a caveat on reserve parcels.

26.1(1) A reserve shall be used by a municipality only for the following purposes:

- (a) a public park;
- (b) a public recreation area;
- (c) a school site or part thereof where the school authority has entered into an agreement with the municipal authority whereby the school is to be used for community purposes outside school hours;
- (d) a planted buffer strip separating an industrial area from a residential area.

(2) Where a reserve parcel has been allocated for the use of a school as prescribed in subsection (1) and that

use is discontinued, the ownership to the reserve parcel reverts to the municipality.

(The Planning Act, 1971, Section 26.1)

The Boards' success in changing this section is briefly described in Chapter 7.

Another incident that generated a confrontation between the City and the Public Board centred on the payment for non-reserve land on the Evansdale School site in the Dickensfield subdivision. (Ironically, the major confrontation over the consumption and sale of alcohol on school property described above also took place in the same neighbourhood.) Consistent with the Public School Board's usual practice of purchasing land when needs exceeded the amount of land allotted through dedication by the developer, on January 12, 1971 the Board acquired Evansdale site (7.11 acres) for \$93,857. A few months later, the Board's administration discovered that the site was part of the non-reserve dedication which meant that the City had not paid for it but had sold it to the Board. On May 5, 1971, the Board made representation to the City's Public Affairs Committee and on July 26, 1971, the Public Affairs Committee approved that:

1. No charge will apply for dedicated land required for schools and parks which comes from the 30% dedication for streets and lanes.
2. If this non-reserve land is not needed for school and park purposes in the originating subdivision, it may be sold as the City sees fit.
3. A caveat is to be registered against this non-reserve land transferred to the Boards stating that it will be transferred back to the City at no cost once the City declares it is no longer required for school purposes.

While it was possible to persuade the City administration that the School Boards should be the authority to declare the land surplus to their needs, the City insisted that a caveat guaranteeing the return of non-reserve land to the City be in place. During a subsequent City Council meeting at which time a report on Standard Terms of Reference for Development Agreements for all newly-developed residential land within the City of Edmonton was discussed and unanimously approved, reference was made to the demand that the land return to the City at the purchase price plus accrued interest (July 17, 1972).

The Standard Terms of Reference for Development Agreements formalized non-reserve dedicated land to boards and reduced the cost of purchasing land. It stated that the owners within an Outline Plan Area would dedicate, without compensation, 40% of their gross developable land (the automatic 40% was later challenged successfully in court by the development industry), and would offer an additional 5% of the gross developable land if required by the School Boards or City at a price reflecting the average cost of raw land at the time of approval of the outline plan. Furthermore, the owner had to agree to sell land in excess of 45% of the gross developable area if such land was required for high school sites.

These provisions were viewed by the administration of the Public School System as having the potential to save the Boards significant amounts of money. The principle supported by the administration was that if the Board could acquire the necessary sites to serve the district's needs at no cost, then the district must accept the position that it would neither profit nor lose financially on the land in the newly-developed areas and would accept a caveat requiring it to return the land

to the City at the purchase price plus the accrued interest and improvements. At this stage (October, 1972), the Board was not prepared to accept this position. Trustees questioned why the City should be able to place a caveat on land it received for free and why the district should be deprived of the opportunity to profit from the future sale of the land. On the other hand, it was argued in support of the administration's position that, if possible, educational dollars should not be used to pay for land and that city taxpayers would benefit from any future profit in any event.

The issue of benefitting from the escalation of land prices, the opposition to caveats on board property and the city's attempts to "move in" on school properties were raised during a board meeting on September 12, 1972, in which the Board eventually approved the transfer of 1.05 acres of land to the City for \$1.00 for the purpose of constructing a swimming pool. The benefit to the program from locating the pool adjacent to a public school and the local community support persuaded the Board to support the transfer of land.

The Public Board's opposition in 1972 to the procedure whereby land the City had obtained for free from developers and passed on to school boards should be caveated, was perceived in a negative way by the City. City administrators suspected that this position was motivated by the Board's desire to speculate with land that was non-reserve dedication and which the City had obtained for public use through economical design of the traffic circulation system. The City's desire to have access to all sites declared surplus by the School Boards, including those purchased at market price in previous years, was expressed by the Parks and Recreation Department. It stemmed from the desire to maintain open areas within

older neighbourhoods. In the early 1970's the Public Board had provided surplus school sites to post-secondary educational institutions for campus development, and the Parks and Recreation Department expected that additional sites would be declared surplus in the coming years.

Subsequent to the Public Board's opposition to the City's intention to place caveats on newly-acquired non-reserve school property, the City took an extreme position in the Joint Use Agreement Review Committee, demanding that all school land be owned by the City with the exception of land on which school buildings were located. During the fourth meeting of the Joint Use Agreement Review Committee on June 29, 1973, the elected representatives accepted the draft agreement subject to resolution of the ownership of land and agreed that the three parties to the Agreement would review their positions, have them approved by their respective legal counsel and exchange them by September 14, 1973.

A review of the respective positions taken by the parties on land acquisition, ownership and disposal, as well as the arguments presented in support of their positions are outlined below and provide insight into the gap between the parties and the extent to which each perceived its autonomy, sovereignty and boundary of control to be threatened. Additionally, the review makes it possible to identify and understand the issues and concerns surrounding the conflict and how it was resolved.

The City of Edmonton Position on Land Ownership

In the preamble of the City of Edmonton's submission to the Joint Use Agreement Review Committee, the City stated that its position with respect to the ownership of school and park lands stemmed from the concern for ensuring that "these lands which are acquired for open space

use by the residents of the city are utilized for the maximum benefit of those residents" (City of Edmonton, Position on Land Ownership for Joint Planning Agreement, 1972, p.1). The main points of the City's position were:

1. The City would transfer to the School Boards land required for school buildings coverage and related building site facilities. The transfer was to occur when facilities were constructed by the Boards on the sites.

2. The Boards would be offered a long-term lease for the playing field portion of the sites. The terms and conditions of use would be identified as required by the schools and thereby the Boards' interests would be secured. The City proposed that the cost of any lease to the Boards would be nominal except when the City had paid for the lands out of general revenue.

3. The agreement would not be retroactive; it would apply to all new lands required for public recreation and joint school campus/park use. The parties would maintain direct ownership and control as established prior to the signing of the agreement.

4. Disposal of surplus reserve land would follow Section 26.1 of the Planning Act of Alberta (see above), and the option to purchase or have first right of refusal on other land declared surplus by a board would be caveated to the City. The City would thereby be able to acquire all surplus sites when the school function was discontinued. The repurchase price would be equivalent to the original sale price to the School Boards plus carrying charges.

The arguments presented in support of this position include:

1. It is essential that school lands remain available for recreational use whether schools are built or not. The provincial freeze on new construction and the enrollment decline in city schools were perceived by city administrators as major factors in creating a degree of uncertainty regarding the future construction of schools. At the same time, it was argued, demand for recreation space such as the playing field portion of what would normally be school sites, had not declined. On the contrary, there were indications of growing demand for a wider range of recreation facilities. City ownership would ensure the availability of the land for recreational use even when school construction was delayed.

2. The acquisition and retention of all lands for school and park purposes by the City would ensure that the standards of open space in new subdivisions would not be reduced.

3. Problems associated with the transfer of land from the City to the Boards and back would be eliminated if the City retained ownership to all the recreational portion of the sites, transferring only the building site to the School Boards (i.e., arranging land transfers, subdivisions, surveys, registrations).

4. The benefits of park/school lands should continue to accrue to the local population who have paid for their provision. Land acquired through reserve dedication, excess land from traffic circulation needs or from the developer under special arrangements come to the City without charge. The costs are borne by the resident in the price of the individual lot and therefore, according to the City, the economic gain from any park/school lands which are no longer required and are sold

should benefit the residents of the area who paid for the land through the purchase price of their lots. On this basis the City argued that:

. . . all such lands should remain in the ownership of the City or where provided for school use should be transferred back to the City to benefit the general public where school usage is no longer required. They should not be sold to provide general school board revenue or to purchase additional school land in other areas.

5. By retaining title to the playing field portion of the park/school site, the City would no longer invest capital funds on land under control of another body. In the words of the City Administration:

. . . if the Boards maintain full title to the land, the City will continue to be in a position of planning major capital improvements on land over which it has no direct jurisdiction. These capital improvements would then become the property of the School Boards.

The City was aware of possible revisions to the Planning Act being considered by the Provincial Planning Board and suggested that the proposed agreement should be re-negotiated if any legislation or other factors considerably increased the City's financial obligations in acquiring necessary funds. One of the changes that was contemplated at the time and which later came into effect was to preclude the use of land from excess circulation to meet park/school site requirements.

Edmonton Public School Board Position on Land Ownership

The Edmonton Public School Board and its administration had to examine three key questions in forming the district's position: (a) to what land should they receive title; (b) should a caveat be placed which ensures that the land returns to the City or the City maintains the right of first refusal over land declared surplus to the Board's needs, and (c) the price the Board has to pay for reserve or non-reserve land. A review of board minutes and reports and interviews with individuals who

represented the Board on this issue revealed that five basic positions were considered by the Board as described in Table 6.2.

The first option reflects the City's extreme position in which the Board holds title to the building site and leases playing fields from the City. A caveat is placed on the building site to ensure that land provided free of charge under the 10% reserve dedication returns to the City following the Board's declaration that it is no longer required for educational purposes. The loss of control over the playing fields and the inability to benefit from the escalation of land prices are the two main concerns expressed by trustees regarding this option. The second position considered by the Board, which members of the administration believed would be accepted by the City, reflected a compromise in which the Board would own both the building site and the playing field, which would give the Board control over sites where educational programs were delivered. On the other hand, the land would be provided free of charge and be caveated. The third option was an ideal one from the Board's point of view and was put forward to counter the City's extreme position. It provided the Board with clear title to the entire site at no cost. Under the fourth and fifth options the Board maintains clear title at some cost to itself. In the fourth option, the Board maintains control of the disposition of non-reserve land at the cost of purchasing such land. The fifth option ignores reserve land and provides full freedom of disposal to the Board as was the case in the 1950's and before. It was recognized that the Board would require a significant amount of land in new subdivisions, and an estimate suggested that, over a period of 20 to 30 years, the price for non-reserve land would be approximately \$6,000,000 and the cost of the entire sites would exceed 21 million.

Table 6.2

The Public School Board's Alternative Positions on Land Ownership

Alternative positions	Options Considered				
	1	2	3	4	5
1. Maintaining land title over:					
(a) building site	yes	yes	yes	yes	yes
(b) playing field	no	yes	yes	yes	yes
2. Agreeing to caveat on land title	yes	yes	no	no	no
3. Costs to Board for:					
(a) reserve land	no	no	no	no	yes
(b) non-reserve land	no	no	no	yes	yes

dollars (assuming a price of \$16,000 per acre). The Board's negotiating position with the City reflected option number four. It suggested that the Board acquire clear title to all sites, including playing fields, from reserve and non-reserve lands and that the Board pay the full cost for non-reserve lands. As indicated above, this position offered the Board control of the disposition of non-reserve land at the cost of having to purchase such land.

Edmonton Separate School Board Position on Land Ownership

The brief prepared by the Catholic Separate School District on land ownership emphasized that their position stemmed from the rights of the Roman Catholic minority guaranteed under Section 93 of the British North America Act which were also provided in the Act which established the Province of Alberta. The brief stated that:

In order to exercise the right and responsibility of providing school services, the school district must have the right to determine where school facilities should be placed within the district, to operate schools, and to own land. If these decisions, especially the ownership of land and buildings, are in the hands of some other body and not the school board, then the right to operate schools which is guaranteed in legislation is being denied to the minority. Those of the Catholic faith in the City of Edmonton are then no longer able to have the type of education which they wish, where and when they wish. (Edmonton Separate School District, Position Re Land Ownership, 1973, p.1)

Although the brief stated that this school district could not sign any agreement which would "in any way sign away or permit the ending of the rights of the Catholic minority in the City of Edmonton," there is no clear indication that this system insisted on owning the playing fields and on receiving clear title. The issue of the price the district would have to pay for land was also not raised. The emphasis was on a reluctance to share facilities, and members of the City Administration

who were prepared to offer ownership of the building site to the Boards felt that this Board would eventually support the City's position. The Edmonton Catholic School District insisted that "the facilities in which the Catholic educational program is offered must be under the direction of the Catholic School Board," and this was guaranteed by the City's position.

Resolution of the Land Controversy

Following the fifth meeting of the Joint Use Agreement Review Committee, at which the respective positions on the ownership of land were discussed, it was agreed that a Committee of the Superintendents and their solicitors would attempt to work out a draft agreement. By February of 1974, the three solicitors had produced a document indicating that they had agreed on all but one issue - the ownership of the playground (playing field) portion of school sites. They agreed on the following eight points and made it clear that their clients would also support the position:

1. The proposed agreement would come into effect on January 1, 1974. It would not be retroactive except that the Boards would grant the City a right of first refusal on all properties.

2. The Boards would own all lands upon which school buildings were erected.

3. Future land acquired by the Boards from the City at a nominal cost would revert to the City after it was declared surplus to the needs of the respective Boards.

4. The City would compensate the Boards for the fair value of improvements on land declared surplus.

5. The Boards would be able to dispose of land owned by them which had been purchased at fair market value, provided that they grant the City the right of first refusal.

6. Land purchased by the Boards at a price higher than a nominal rate but lower than market value could be sold subject to a right of first refusal to the City, with the Board receiving acquisition cost of the land plus interest and fair value for improvements. Any surplus would be divided using the ratio between the purchase price and the fair market value at the date of acquisition.

7. The Boards would compensate the City for out-of-pocket expenses incurred while serving as the Boards' agent in acquiring non-reserve land.

8. The Boards' compensation to the City for out-of-pocket expenses, incurred while acquiring land for the Boards at a rate higher than \$1.00 but lower than market value, would be considered as part of the acquisition costs.

The respective solicitors could not agree on the question of ownership of the playground portion of the school sites since the clients' positions were far apart. In a summary of their negotiations, prepared by the Public School Board solicitor, they presented the respective arguments on this issue, providing additional insight into the rationale of the City and the Boards as follows:

The position was advanced on behalf of the Board that it is essential that the Board have control over the use and development of playground areas so that it is not restricted in the physical education portion of its curriculum. In addition, future expansion of school buildings makes it necessary that the Board own the playground areas. It was mentioned that where the City intends to construct a swimming pool or community hall or incur substantial capital expenditures in the erection of some other facilities, the Board will, as in the past, transfer ownership to a requisite portion of the

playground area provided that portion is not required for the purposes of the school curriculum. It was suggested that the City's position of ensuring that open spaces are retained within the City boundaries is not in jeopardy, bearing in mind the right of first refusal that would exist on all non-reserve land and the statutory requirement that all reserve lands, the use of which has been discontinued by the school, revert to the City.

Although the City of Edmonton pays the costs of developing the playground areas and some of these are used for school purposes, this factor is off-set by the use of school facilities erected at the expense of the Board, by the City.

The position advanced by the City was that the School Board could have control over the use and development of those portions of the playground area required for the physical education portion of the curriculum without the necessity of having absolute ownership of the site. For example, long-term renewable leases could be utilized.

(Summary of Negotiations Between the City and the School Boards, 1974, pp.3-5)

The City's solicitor sent a memorandum to the Superintendent of Parks and Recreation on March 1, 1974 and attached the summary of the negotiated position. He suggested that weak arguments had been advanced by the parties with respect to why they should be entitled to ownership and that in his view it was not necessary that the City retain ownership of the land in order to ensure that open space remain open space available for recreational purposes. The solicitor stated that, "It is my opinion that this issue has become substantially a political issue and neither the position of the School Board nor the position of the City is totally defensible." Another point made in this memorandum was that, in the event that the City did not transfer the land to the Boards (option number 5), the Boards would have to purchase their own land, a move which could potentially be politically and economically unwise.

The School Boards recognized that under the existing legislation in 1974 the Boards had no legal entitlement to any reserve land. Under the

terms of the Planning Act, the City was given the land and provided a portion of it to the two School Boards. The School Boards' representatives felt that the City was using the fact that under the existing legislation it did not have to convey land to the Boards as a club to hold control of land. The administration of the Public Board felt that not building schools in the newly-developed suburbs because the Board did not receive the "necessary" land from the City would bring urgency to the issue and strengthen the Board's position. Despite the view expressed by one trustee that the Board would be better off buying school sites and holding clear title than obtaining them for a nominal fee and having to accept a caveat which eliminated the Board's right to sell property, the Public Board approved a position based on the points agreed upon by the solicitors (June 4, 1974). The Board maintained its position that playing fields should be owned by the Boards and conceded that it would provide the City with the option of first refusal with the price being determined on the basis of the Board's purchasing price, interest and improvements.

The two key parties to the dispute continued to explore ways of resolving the disagreement, but with little success. The General Manager of the City's Real Estate and Housing Department served as chairman of the City's Administration Committee which discussed an administrative response to a submission by the Public Board on the land ownership question. In a memorandum to the Commissioner of Public Affairs dated May 2, 1975 he stated that:

The City and the School Boards are plainly widely separated on their respective views, and I doubt whether the recommended response will be acceptable to the School Boards I would recommend that, if the Administrations of the two School Boards do not agree to the proposal developed by your Committee, a solicitor be appointed who will view the positions

of both jurisdictions and make a ruling on the matter.
(Memorandum from the General Manager, Real Estate and Housing
Department to Commissioner of Public Affairs, May 2, 1975)

The submission of the Public Board maintained that the Board should hold title to all lands required for elementary and junior high school programs including the grounds required for school sports and athletics. The Board was prepared to compromise on the ownership of senior high school grounds. It argued that the grounds required for school sports and athletics and public recreational purposes would be purchased and held jointly by the City and the Boards but insisted that zoning by the City not negatively affect the value of school property.

Following this impasse, the Mayor met with the elected representatives of the three parties to discuss the proceedings and progress to that point. The Mayor, who became involved in the controversy, separated the issue of land from that of joint use. He requested that a task force from the Parks and Recreation Department prepare a study relative to the City's position in the Joint Use Agreement. The Board administrators interpreted the Mayor's intervention as a shift from the City's position of maintaining the joint use arrangement but not transferring land to Boards for playgrounds to a position that land would be provided but the Joint Use Agreement would not. This reflected the view expressed earlier by the City's solicitor in his memorandum of March 1, 1974 to the Superintendent, Parks and Recreation Department who suggested that, "the City could survive much better without having access to the schools than the schools could without having access to the playground areas." The City assumed that the Board would not lock the community out of the schools, and at the same time it was believed that the City would be able to reduce

significantly its contribution to the design, development and maintenance of grounds.

In response to a City proposal (which constituted a compromise on land ownership) that the grounds required for school sports and athletics and public recreational purposes be purchased and held jointly by the City and the Boards, the Board held its ground by insisting on control through ownership of playing fields but agreeing to enable the City to access more funding for site development. The two points in this regard supported by the Board were: (a) that the division of responsibility for grounds development should serve as the basis for distribution of funds acquired from the developer under the development and servicing agreement for the development of parks and schools, and (b) that the City levy local improvement charges on behalf of the School Boards to cover the costs of site development in the event that funds from the development and servicing agreement proved to be insufficient.

Draft Number 8 of the Joint Use Agreement which was approved by the Boards and City Council in November, 1975 was formed on the basis of the "Joint Use of Facilities" agreement of 1973, the Board's position on the ownership of the playing fields and the option of first refusal to purchase non-reserve school sites declared surplus by the Board. City Council approved it on November 26, 1975 subject to: (a) Schedule A dealing with the purchase and disposal of land being reviewed and edited by the respective solicitors, and (b) Schedule B containing a satisfactory general definition of costs incurred by the parties as a result of the agreement. The Mayor passed away earlier that month and several administrators perceived that Council was tired of the long impasse and was eager to have the agreement approved.

Although the parties agreed in principle on the land schedule in November 1975, the signing of the official agreement was delayed by several years. The delays resulted from the document being changed into legal terms, changes in the Planning Act and amendments sought by the Boards that would protect the value of the Boards' school sites from the effects of a new land use bylaw. The Planning Act introduced in 1977 contained several changes. It no longer required that an agreement enabling the municipality to use schools after school hours be in place as a condition for receiving reserve lands. However, it left the decision regarding the needs for school sites in the hands of the municipality in cases where an agreement was not in effect. The concerns of the two School Boards in Edmonton regarding the Planning Act 1977 were expressed in a joint brief which stated that:

A principal concern of School Boards was the requirement that reserve land, to be used for school and municipal purposes, was to be apportioned in accordance with an agreement between the parties, or in the absence of an agreement, in accordance with their respective needs as determined by municipal authority. (Edmonton Public School District and the Edmonton Catholic Separate School District, Brief on the Planning Act, 1977, March 1980)

The municipal control over decisions affecting school sites, granted to it by the 1977 Planning Act, was of major concern to the Alberta School Trustees Association. In a brief on the Planning Act, 1977, the Association suggested that the act established decision-making authorities which effectively controlled the direction of the planning process. Furthermore, it proposed legislative changes in an effort to obtain mandated representation for school authorities on these decision-making authorities.

The Act also protected developers from excessive demands for dedicated land. The municipality was given the right to require

provision of reserve land for school and park sites up to but not exceeding 10%. (Only in exceptional cases of high density was it ~~possible to~~ apply for a higher dedication.) Furthermore, the provision which enabled the transfer of excess circulation land (circulation being roadways, walkways, utility corridors, etc.) to schools and parks was eliminated and resulted in a reduction in the total amount of land dedicated by developers. The emphasis was on dedicating land for specific demonstrated needs rather than a fixed percentage which had been the basis for land acquisition by the City in the previous Planning Act.

A second reason for a delay in finalizing an agreement on the land issue was related to the City's attempt to introduce a new land use bylaw (Bylaw 5910) which would have had a negative impact on the value of school property. In the Joint Use Agreement, the Boards attempted to protect school sites from the effect of zoning changes. However, the existence of a ninety-day termination clause through which any one party could unilaterally terminate the agreement brought about concerns regarding future uncertainty. In addition, the provision granting the City the first option to purchase sites declared surplus by the Boards did not bind the City and did not guarantee that it would exercise its option. The Boards felt that they should be able to dispose of sites in the open market if the City declined to exercise its option to purchase or the agreement was terminated. The proposed rezoning, which would identify the school sites as such rather than identifying them as their original zoning at the time the land was purchased by the Boards, would eliminate the notion of market and render school sites worthless. These sites were mainly zoned for residential development. The proposed rezoning was perceived as a form of expropriation of school land and

therefore the Board opposed the land use bylaw which in general was intended to protect public amenities and to be in the best interest of the citizens of Edmonton. The proposed zoning bylaw established a category called Urban Services and intended to place all school sites within it. The comments of the Separate School District regarding the proposed bylaw are quoted in a reply from the Planning Department.

The draft land use bylaw is, in its school lands provisions, an attempt by one form of elected municipal government to interfere unacceptably in the function and responsibility of another form of elected municipal government.

The draft bylaw would have the effect of confiscating millions of dollars of asset value by downgrading zoning If the City Council's advisors in this regard are saying that the discretionary decisions of a zoning officer may protect elected boards from this confiscation, that is unacceptable, such a massive confiscation and writing down of asset value . . . is actually an interference with education itself. (Planning Department, City of Edmonton, Response to the Comments of the Edmonton Separate School Board on the Land Use Bylaw, March 5, 1980)

Following the strong negative reaction from the Boards, a joint meeting of aldermen and trustees was arranged in order to explore possible approaches to resolving the disposition of land issue. The meeting produced a suggestion that would overcome the Boards' objection to the proposed zoning bylaw. This was in the form of an agreement that the City would be obligated to purchase all the land declared surplus by the Boards and that this part of the agreement would be in perpetuity rather than with a termination clause. The determination of the price was left to the administrations of the respective parties. They in turn proposed that the price be based on 75% of the market value of the surrounding property. Objection to this recommendation was expressed by Public School Board trustees who defeated a motion to support it by a tie vote (3:3). They approved a motion supporting the agreement inclusive of

Schedule A as amended and Schedule B. With regard to the price of land which was to be disposed of, it was approved that City Council be approached in order that questions with respect to the reasons for establishing the compensation level at 75% of the market value of surrounding property rather than 100% could be raised and explained.

The position of the Separate School Board was expressed in a memorandum from their Superintendent to the Minister of Education, the Mayor and the Chairman of the Edmonton Public School Board dated May 30, 1980. He stated that in Calgary the School Boards were entitled to 100% of the market value and argued that such conditions should also apply in Edmonton.

City Council supported its administration's recommendation to keep the rate at 75%. In their view, it was more than fair to pay 75% of commercial property value for land that would be developed as a park. Even among aldermen there was not unanimous support for the recommendation. In support of the administration's recommendation, the Associate Superintendent, Planning and Development, of the Public School Board indicated to Trustees that "some Aldermen were willing to provide the School Boards with 100% of market value for their lands while others did not feel School Boards should be paid anything for surplus lands" (Edmonton Public School Board, Minutes, March 11, 1980). The administration's rationale for recommending the 75% was that the school districts had to provide the City an incentive to buy the sites, especially if the City were to pay commercial or residential rates for land to be used as an open space.

The Edmonton Public School Board approved the Agreement inclusive of Schedule A dealing with the acquisition, maintenance and disposal of land.

on June 20, 1980 and the other two parties approved it in the same month. As a final comment in this section, it is interesting to note that the trustee who opposed the signing of the Agreement indicated that:

. . . the Minister, in speaking with Trustees, cautioned signing of the Joint Use Agreement prior to careful consideration. She noted one of the Minister's comments that indicated the School Board is not subservient to the City of Edmonton. (Edmonton Public School Board, Minutes, June 20, 1980)

Summary

This section illustrated the high level of sensitivity over land-related issues within the metasystem throughout the study period. It highlighted the Public School Board's persistence in maintaining ownership of land on which its programs were delivered and guaranteeing maximum return for education dollars. The respective positions on the land issues and the rationale for the positions taken were presented in this section. The City, which was heavily involved in the land industry (i.e., land dedication, development agreement, sale of lots), wanted to ensure that land declared surplus to school boards' needs would revert back to the city so that it could be used for recreational purposes. To guarantee eventual control over such land, the City maintained that it should lease the playing fields to the Boards and argued that the Boards could maintain control over the portion of the site required for the physical education portion of the curriculum without having absolute ownership of the site. The City was also opposed to the idea that the School Boards should profit from the sale of land they had received for less than market value. In short, the City perceived land to be its domain and expected the Boards to concentrate on education.

The Public School Board on the other hand, claimed that it was essential that the Board have control over the use and development of playground areas so that it could maintain flexibility in the physical education portion of the curriculum and would be able to expand and build additions to the core school. The case advanced by the Separate Board was based on the guaranteed rights of the Catholic minority under the law. It submitted that the Separate Board must have the right to operate schools, to own land and to determine where school facilities should be placed.

This section described strategies used to overcome the disagreements and reviewed the stages leading towards the resolution of the land controversy.

Summary of the Chapter

This chapter focused on three major conflicts that took place within the metasystem during the study period between 1970 and 1980. The common denominator appeared to be pressure placed on the two school districts by the City and local groups to give up authority and control over their facilities and provide community groups with autonomy and decision-making powers. In the case of the community school concept, the Boards feared that educational dollars would have to be spent on services beyond their mandate. There was no evidence of financial support that would extend the concept to all schools, include a wide range of human services, and adopt a life-long education philosophy. The control over activities on school property and the value judgement that education and alcohol do not mix were the key points in the controversy over the policy prohibiting the consumption of alcoholic beverages on school property. Again, this

conflict reflected the local desire to control the activities in schools after regular school hours. The third conflict centred on the Boards' need to maintain the title for school site land in order to deliver the physical education programs. The City wanted to maintain ownership and lease this land to the Boards.

On all these issues, the School Boards, and in particular the Public Board, jealously protected and defended the interests they had been elected to serve - the education of children. Other activities were supported to the extent that they did not detract from the prime responsibility nor draw on the resources available for education. (There were a number of exceptions in the form of community schools pilot projects and drop-in centres.) Any proposal that had the implication of sharing control or transferring power to community groups (e.g., Community Councils) or Parks and Recreation (community use of schools after regular school hours) was vigorously rejected. Support for decentralization appeared to be limited to cases where the school principal maintained control of the function so that the activity remained under School Board control and had to follow its policy.

These circumstances affected the nature of the Joint Use Agreement which was negotiated by the Joint Use Agreement Review Committee during the 1972-73 school year. The final product was not prescriptive and did not guarantee a shift in decision-making power to the community, but remained a "gentlemen's agreement" which included three sets of regulations developed by the respective organizations to control and regulate access to 'their' facilities.

CHAPTER 7

BOUNDARY MAINTENANCE: PRESSURE FROM THE EXTERNAL ENVIRONMENT

Introduction

The general environment affecting all organizations includes the political, economic, social and cultural conditions surrounding them (Hall, 1977). These conditions formed part of the external environment of the metasystem under study. Besides these environmental conditions, there were organizations, groups and individuals who were involved in activities associated with various issues dealt with during the discussion on the Joint Use Agreement in Edmonton. The identification of the boundaries of systems or metasystems and the determination of what remains within these boundaries and what actually belongs to the external environment is not always easy (Aldrich 1971; White 1974). The context suggested by Laumann, Galaskiewicz and Mardsen (1978) which is based on the delineation of two criteria - the functional and the geographical domains - was applied in the identification of the external environment in this study.

For the purpose of this study, organizations, groups and individuals who were involved in activities pertaining to the content of the Joint Use Agreement, and who operated within the City of Edmonton, were considered as part of the metasystem. The external environment of the metasystem was considered to include either organizations, groups and individuals who dealt with issues relevant to the Joint Use Agreement but whose sphere of influence extended to the entire province (e.g.,

Provincial Government departments) or organizations and groups operating within the City and involved in activities which could be seen to have a more indirect impact on the Joint Use Agreement (e.g., the City Department of Social Services). The influence exerted on the metasystem by the external environment was identified as sub-problem 5 in this study. The specific question posed was, "What were some of the pressures upon the focal organizations originating from the external environment which were associated with their position on the Joint Use Agreement?"

In describing the setting of the case study, it was indicated that during the late 1960's and the early 1970's, pressure was exerted to decentralize decision-making, reduce red tape and involve people in decisions that affected them. In the educational milieu, the demand was expressed in terms of (a) enhancing the availability of school facilities for use by the community; (b) involving the public in the teaching-learning process and curriculum development; (c) viewing education as a life-long process concerned with the total person and available to both children and adults; and (d) accommodating a variety of human services and considering the school as a community centre.

The two Edmonton school boards were aware of such demands which originated from within the metasystem (e.g., the City's Parks and Recreation Department, community leagues) as well as from the external environment (e.g., Provincial Government departments, the City's Social Services Department) and took measures to maintain their boundary of control, withstand the pressure and protect the area they felt was their major responsibility and for which they were elected - the education of children.

In this chapter, activities external to the deliberations over the Joint Use Agreement but which involved elements negotiated were selected for this investigation. The analysis provides further insight into the organizational and societal attitudes of this period and identifies the opposing positions of organizations which attempted to maintain their traditional area of control and those interested in bringing about change.

The three elements studied in this chapter are:

1. The report of the Commission on Educational Planning: a Provincial Government initiative to study the needs of individuals in the Alberta society, analyze their total educational requirements and recommend a mechanism for the delivery of a comprehensive educational program.

2. The provincial perspective on the use of community facilities and the community-school concept. The Provincial Government, being the body which delegated power to the parties to the Joint Use Agreement, was a significant force in the external environment and its views were seriously considered by the parties involved. It was assumed that the Government, having been elected by the citizens of Alberta, was aware of changing community expectations and any changes in provincial positions and initiatives. Therefore, a review of the provincial perspective regarding the community use of schools and the community-school concept is vital to the understanding of the interaction on these issues in the City of Edmonton.

3. West-10: an experiment in the co-ordination and integration of human services at the local level. The development and decline of an experimental project that has the potential of resulting in the

restructuring the local governance of education and other human services in the city is examined in this section. It provides an opportunity to gain insight into activities within the external environment which were of concern to organizations such as the school boards which wanted to preserve their power and span of control.

The Commission on Educational Planning

Introduction

One of the three elements associated with the Joint Use Agreement was the Report of the Commission on Educational Planning. The report was analyzed in order to gain insight into how the external environment perceived and influenced issues associated with the Joint Use Agreement is the work of the Commission on Educational Planning in Alberta. The Commission was directed to collect information from Albertans in the process of developing a comprehensive educational program for the province and therefore, it is assumed that the views expressed in the report are those of the external environment. Two of the parties to the Joint Use Agreement - the Edmonton Public School Board and the City of Edmonton accepted the Province's invitation to make a submission to the Commission. This fact provides the opportunity to identify and compare the respective positions of these two components of the metasystem regarding the future of education as well as permitting the verification of earlier findings. Additionally, it makes possible an examination of the extent to which the different stands taken by the parties were endorsed and recommended by the Commission to the Government of Alberta. It is not within the scope of this study to establish whether the opinions advanced by the two parties, the City of Edmonton and the

Edmonton Public School District, directly influenced the commission and it is assumed that any position taken was based on input from more than one organization.

Background

A Commission on Educational Planning, headed by Dr. Walter Worth, was established by Order in Council in June of 1969 under the Alberta Public Inquiries Act. The Commission's task was to investigate social, economic and technological trends for the future, to examine the needs of all individuals in society, to analyze the total educational requirements and to recommend the future changes, structure and priorities necessary for a comprehensive educational program (Report of the Commission on Educational Planning, 1972, p.307). A public involvement program was one of the activities initiated by the commission prior to the release of its final report on June 16, 1972. Submissions were received from 330 individuals, groups and organizations, among them briefs from the City of Edmonton and the Edmonton School District No.7, two of the three signatories to the Joint Use Agreement. Comparison of the two submissions highlights the concerns of the respective parties with regard to education and identifies the gaps in their perception of necessary changes in education. For example, the City expressed the desire to shift the source of revenues for education away from the property tax and towards funding from general revenues which are based on income and sales taxes. The School Board, which would be expected to lose some of its autonomy if such a proposal were to be implemented, strongly opposed the City's view on the source of funding for education. A case in support of

a change was presented in the Commission Report and is presented later in this chapter.

Another issue of major concern to the City was that schools had traditionally been considered a "little island set apart" from the rest of the community. The City's position emphasized the desire for the local community to have some degree of decision-making power with respect to the school's financial plan (budget), and called for the transformation of all educational facilities into community centres to be developed by and for the people served by the community. The School Board, on the other hand, while recognizing the need to involve the community in school affairs, was not prepared to offer the community an independent decision-making role. "Involvement" was interpreted by the school district as having an advisory capacity. An overview of the submissions made by the Edmonton School District No.7 and the City of Edmonton to the Educational Planning Commission is presented below.

The Edmonton School District No.7 Brief

The introduction section of the district's submission presented to the Commission on Educational Planning shed some light on its preception of what was going wrong in the society of the late 1960's. It suggested that:

Daily we are becoming more aware of the ills of our society. Faith in our ability to cure those ills through education is still very high, although confidence in our schools is presently rather low. We can, therefore, be optimistic concerning man's future if the schools become the living, dynamic force for the kind of problem-solving and decision-making which the public believe possible through education. Such optimism, however, is conditional upon our ability to transform our educational institutions into change-oriented agencies for human and social development.

Militancy among parent, student, and teacher groups is steadily increasing. By "militant" we mean any pressure group that persists in forcing its particular thinking on the rest of society with little or no regard for other views and potential solutions.

Some students, frustrated by the "system", are militant in their effort to bring about reform. They want institutions to become more sensitive to student needs and to become more actively concerned about social issues We could well consider the militancy problems in our society as a desirable condition. They are telling us that schools in the past have failed to respond adequately to the changes which have taken place in our society. (Edmonton Public Schools, A Brief Submitted to the Commission on Educational Planning, May 1970, pp.2-3)

The Deputy Superintendent, in presenting the brief to the commission, noted the emphasis placed upon co-operation among individual groups and organizations involved in the educational process. He used the joint development agreement as an example of co-operation at the local level. The agreement had been in place since 1957 and had become a formal agreement between the City of Edmonton and the Edmonton Public School Board in 1959. It remained in effect until 1966 when the Edmonton Separate School Board also became a party to the agreement. The Deputy Superintendent made reference to the district's five recommendations to the Commission, which are listed below, and stressed that:

Lip service has been paid to autonomy of school boards and to freedom of action at the local level. Recent restrictive action on the part of the Department (provincial Department of Education) would indicate an erosion of these principles rather than their fulfillment.

The five recommendations presented by the Board were:

Recommendation 1: That the Department of Education and local school board policies encourage community participation in changing the educational programs of their schools to meet the developing needs of each particular community and the larger society of which it is a part.

This, it was argued, could be achieved through: (a) enhancing community involvement in curriculum building; (b) involving the community

in the teaching-learning process; (c) considering the community as a learning place; and (d) reducing prescriptions and outside control of the school.

Recommendation 2: That the Provincial Department of Education be charged with the responsibility for co-ordinating the programs offered and the long-range planning of all educational institutions and school systems in the province.

In this context, it was expressed that the Edmonton Public School District was prepared to assume its rightful responsibility for post-secondary and life-long education, however, a decision was required regarding the division of responsibility and the financial support for such an undertaking.

Recommendation 3: That Human Relations and Public Information ~~programs for the~~ Edmonton area be ~~established by a~~ joint planning board for the express purpose of (i) informing the public (on a continuous basis) on all educational matters, and (ii) developing an attitude of commitment to education on the part of all citizens, including persons engaged in education.

In discussing the rationale for this recommendation, it was stated that educators had not succeeded in communicating with the public, parents and students, and therefore were unable to obtain the required support. Furthermore, progress in education was hindered because of an increasing information gap between the school and the community, as well as the fact that non-educators were typically excluded from educational decision-making.

The fourth and the fifth recommendations reflected the need to integrate research findings into practice, with particular emphasis on evaluation and the preparation of teachers and administrators for their changing roles, as follows:

Recommendation 4: That all educational research activities in any given region, such as the Edmonton area, be co-operatively planned and integrated to meet future needs.

Recommendation 5: That programs for the preparation of teachers and administrators be carefully studied and restructured to meet future educational needs in a changing society.

While the School District strongly supported the decentralization of decisions to the local level, it was apparent that there was no intention to transfer control outside of the educational system. A school administrator was perceived to be the leader who would bring about the change. In the words of the brief, "... he (she) now becomes the change agent who will determine in large part what changes take place in the instructional practices in his (her) school." The role of a school administrator as the community school leader was also expressed by the Deputy Superintendent of the Edmonton Public School District during the submission of the brief. He indicated that a school administrator in the community school team would have a variety of individuals responsible to him, including teaching personnel, a recreation supervisor, community relations workers and various volunteers.

The City of Edmonton Brief

In contrast to the position taken by the Edmonton Public School Board, the City of Edmonton supported the provision of a much stronger decision-making role for the local community in school operation. It viewed the school as a community facility which should accommodate all community activities and be under community control after school hours. The City of Edmonton submission, summarized below, also put forth a position on the educational property tax, a position with which the school board strongly disagreed.

The City made the following eleven points in their submission:

1. The educational process should become a total process aimed at the development of the total person.

2. The curriculum should be both utilitarian and humanitarian. It should (a) provide for social, cultural, economic and political growth, (b) allow total involvement of the student from childhood to adulthood, (c) provide for all cultures, (d) provide for articulation, and (e) be planned, researched, tested, applied, evaluated and ever remain unfinished.

3. A continuous teaching and learning process and method should be developed which would focus on the individual with a view to providing for his/her full development.

4. The community's human resources should be utilized in its education process. Community school directors should be appointed to work in pilot projects to develop the community centre concept.

5. Authorities developing and implementing policies in education would have to become more responsive to the community they serve. The Federal, Provincial and Municipal Educational governing structures should be revised to ensure local autonomy in the decision-making process. Methods should be found or developed to involve more individuals from the community in the decision-making process, to ensure that community demands and requirements are known and to guarantee that these needs are met.

6. The property tax should be used primarily to finance those services and facilities directly related to property. Services related to the welfare of people, i.e., education, welfare and health, should be borne by senior levels of government. In the City of Edmonton's opinion,

only a limited amount should be requisitioned on the tax base of a municipality for educational purposes.

7. There should be a realignment of structure in the operating and financing of the recreational process. This was expected to result in municipal endeavors in the recreational-educational field being melded with the overall educational process.

8. The school budget should be the financial plan for translating into reality the educational program which the school board, staff members, students and other citizens would agree upon as desirable for the community.

9. All educational facilities, existing and planned, should be modified to become community centres, developed by and for the people in the community served. Material resources should be acquired to meet the needs of the community centre concept.

~~10.~~ All physical facilities for education should be made available for educational or other community uses on a full-day, year-round basis.

11. Major reviews of the educational system at regular intervals should become mandatory and meaningful criteria and should be used to determine the effectiveness of the education program.

The Parks and Recreation Department played a significant role in developing the City's brief and following the submission it adopted a number of the positions as their 'philosophy' for service delivery. These positions also served as the basis for the Department's negotiations and interaction with the school boards on such issues as: community use of school space, community schools and summer use.

The comparison of the two submissions reveals different expectations for the future of education between two of the three parties to the joint

use agreement. The second part of this section examines of relevant parts of the Report of the Commission on Educational Planning and the reaction to it. The Commission which assessed the views of Albertans on the future of education provides an insight on how the "external environment" to the metasystem viewed issues associated with the Joint Use Agreement.

The Commission Report

The release of the report of the Commission on Educational Planning on June 16, 1972 was a significant event for education in the Province of Alberta which drew media attention for months following its release. The report raised issues regarding the sovereignty and power of school boards which were significant to the focal organizations in the metasystem and became relevant during a subsequent discussions of a committee of two elected representatives from each of the parties to the Joint Use Agreement which was established several months later in order to review the agreement.

The report received wide coverage across the province. An article in the Calgary Herald indicated that this report was "perhaps the most important educational document ever produced in Alberta" (Calgary Herald, September 5, 1972, p.5). On the day of its release, the Edmonton Journal, the largest daily newspaper in the City, had a front page article entitled: "Sweeping School Reform Urged in Worth Report" (Edmonton Journal, June 16, 1972, p.1). Two of the recommendations highlighted for public consumption were: (a) that school councils composed of parents, teachers, school officials and older students would take over some functions of school boards, and (b) that the dependency of

education on the property tax was to be scaled down. Adding fuel to the fire as far as the school boards were concerned were two political statements in the article. One quoted the Minister of Education as having stated that some recommendations of the Commission might be implemented before the fall legislative sitting. The second political statement was attributed to Dr. Worth, who allegedly remarked upon the acceptability of the recommendations, stating that he was confident that the new Conservative government would adopt the report more readily than the former Social Credit administration might have.

The report suggested that Albertans would have to choose between two extreme societies, the Second Phase Individual Society and the Person-Centred Society. In the first one, the most dominant feature would be its institutions, which would be seen as a method for organizing resources in the most efficient manner. This was likely to give rise to the growth of concentration of power in a bureaucratic and knowledge-based elite. On the other hand, the goals of the Person-Centred Society included "making economic growth meet human needs, achieving advances in knowledge and aesthetics and controlling social problems so individuals may progress towards their own goals of self-fulfillment" (Report of the Commission on Educational Planning, 1972, p.281). The report suggested that the goals, ideals and principles of Albertans were better suited to a Person-Centred Society, where the industrial system was subservient to the larger purpose of society - the enrichment of all human beings. As a result, the proposed plans were aimed at moving the province in this direction.

Issues relevant to the Joint Use Agreement which were discussed in the Commission Report included: community involvement in school

decision-making through school councils, the community school concept, use of school facilities and the extent of school boards' mandate. Another issue raised in the report which was of significance to the three signatories to the agreement was the question of the source of revenues for education. The different issues are discussed below as they related to the recommendations in the report and as they reflect the positions taken by the parties to the agreement.

1. School councils

The Commission Report proposed school councils which would be substantially different from the local advisory boards existing in numerous schools across the province:

The essential difference in composition would be the involvement of students and staff on school councils. In function, the councils would have important responsibilities particularly with respect to the process of education The responsibilities assumed by councils might include: determining school budget priorities, planning and organizing further education activities, developing most school regulations, including those dealing with attendance, discipline, and dress; formulating program policies within the broad framework established at the provincial and school system levels; auditing the extent to which agreed-upon objectives are being achieved; and communicating community-school needs and concerns to school boards. The details of conditions of service for school personnel within the general guidelines set by the school boards - excluding salaries - might also be determined by the councils. In addition, councils ought to have powers of delegation that would facilitate the use of committees for specific tasks, such as the supervision of recreational and facilities use. (Report of the Commission on Educational Planning, 1972, p.281)

While this proposal reflected the desire among many Albertans to give people more say in the affairs of schools, the position was strongly opposed by trustees. The Associate Executive Director of the Alberta School Trustees' Association wrote an article, published in the June 20, 1972 issue of the Edmonton Journal, reacting to selected topics presented in the Commission Report. He made reference to the proposal to

establish school councils composed of parents and other laymen, as well as school staff and students, and stated that the transfer of functions now carried out by school boards to school councils has "tremendous implications for trusteeship." A former Superintendent of Schools of the Calgary Board of Education questioned the rationale for proposing a parent advisory council considering that it had "failed miserably in the past" (Calgary Herald, October 4, 1972).

The Board of the Edmonton Public School District discussed the report of the Commission on Educational Planning on numerous occasions following its release. On June 20, 1972, during discussion prior to the approval of the community school concept, a trustee referred to the Commission Report and stated that the Board needed to take some steps towards establishing better relationships between the community and the school. The issue of school councils was discussed at the October 10, 1972 meeting of the Board and the following motion was passed unanimously: "That the Board agree with the Commission's endorsement of extending community participation in education providing that school councils are advisory in nature." Trustees of the Edmonton School District strongly objected to the concept presented in the Commission Report which provided community councils with autonomy with respect to programs. During a meeting at which a discussion took place of a letter from the Edmonton Area Council of Home and School Associations requesting representation on an ad hoc committee to determine the terms of reference of community councils, a trustee emphasized that the council should be an advisory one. She also warned that it could start as an advisory council but might later extend to take a governing role if it followed the concept.

It should be noted that this trustee was considered to be the community school advocate on the Board, and that the other trustees were even more concerned about maintaining the Board's power as a guarantee for quality education. Another point that should be made is that while the Commission Report referred to the councils as "school councils," on many occasions trustees referred to them as community councils. In reading the minutes, one receives the distinct impression that the Board saw an opposition between "outsiders" and "insiders" with respect to the educational process; a "we" versus "they" concept.

2. Community schools

The report differentiates between the community-school concept and the community use of schools. It suggested that community schools can serve society as: (a) a place for schooling; (b) a neighbourhood centre; (c) a vehicle for the delivery of health and social development services, and (d) a focus for community life. The report argued that the increased cost would be covered by funds then available to support the additional services (e.g. social services, recreation) and that, compared to the benefits to be derived from the expanded use of schools, increased expenditures for upkeep would be minimal. The statement, "They (the additional expenditures) might better be viewed as an excellent investment," (Report of the Commission on Educational Planning, 1972, p.146) raised the question "for whom?" If it was society as a whole that was to benefit, then why wasn't education already receiving the added funds required for the accommodation of social, recreational and other community development activities? Or was it meant to be an excellent investment for education which would bring about positive results as far

as pupil achievement was concerned? And in that case, what would be the future role of the school principal?

The report was vague on these issues and did not directly address any of the questions. Another example of ambiguity was found in comparing the statements made in the report regarding the issue of local governance of education with those addressing the community school concept from an educational perspective. It stated that "experimentation with the total services approach to meeting human needs will call for redistribution of power and personnel" (p.144). At the same time, the report suggested that the community school must not be introduced to the detriment of the fundamental purpose for which schools exist. Therefore, school use should be prioritized, with basic education receiving prime consideration and social services, recreation and other community services being given consideration after all educational requirements had been addressed.

It appears that the report attempted to satisfy the two extreme positions presented by the City of Edmonton and the Public School Board. The report did not provide clear direction on the issue of community schools and raised more questions than it answered. A discussion on provincial initiatives in this area following the release of the report and the Edmonton Public School District's experience are discussed in other parts of this document.

3. School facilities

Consistent with the City of Edmonton submission, the Commission supported the concept that school facilities should become part of an integrated community life support system and argued that it was only appropriate that design decisions be made at the local level. The Commission encouraged the integration process so that schools would

become a community resource and the educational heart of the community. Local school design, it was argued, "will help to ensure that the facilities serve the needs of the community" (p.251). In the same vein, it was recommended that a moratorium be declared on the construction of all buildings designed to be located in isolation in the community (eg. community hall, local health clinic, library).

The report also suggested the extension of the community school building to community-oriented businesses such as banks and restaurants. It was argued that such an initiative would draw adults into the facility and thereby improve community attitude towards the school, generate revenues, thus reducing capital and operating costs, and serve as a life experience for learners.

4. Future revenue sources

As with the use of school facilities, the Commission supported the city's position on sources of revenues for education. The report suggested that a large number of Albertans were convinced that the provincial government should assume fiscal responsibility for early and basic education and that some opportunity for financial enrichment should be provided at the local level. In support of this position, the Commission argued that there were three major deficiencies in relying on property taxes to support early and basic education: (a) real property is not a good indicator of the individual's income or current wealth, (b) it has a strong negative effect on individuals with fixed or low income, and (c) local tax is unsuited for services that have provincial and national benefits. The City of Edmonton argued in support of the position that property taxes should be used primarily to finance services

directly related to property, and that additional provincial revenues from sources such as income tax and sales tax would be required to effect the tax shift. A possible outcome of such a funding mechanism is the equalization of Districts' purchasing power across the province.

The counter argument to this position is that it would reduce the school district's autonomy to determine the level of educational services to be provided to the public which elected them. Communities which would desire to spend more on education, beyond the level provided by the province, would not be able to do so.

Summary

A review of the submissions to the Commission on Educational Planning presented by the City of Edmonton and the Edmonton Public School District, revealed a gap in these organizations' respective views on the role of the local community and the Board in determining the use of school facilities and providing educational, recreational and other human services to the community. The City desired a shift in decision-making powers from the Boards to the local community on matters such as the use of school facilities after school hours and the teaching-learning process. The Board, which wanted to maintain its authority and control over the education of children as its prime responsibility, was naturally reluctant to support a revision in the governing structure of education and the proposed conversion of schools into community centres where education would be just one of several services offered.

The Commission, considered in this study as part of the external environment, endorsed several positions presented by the City, which did not receive the School Board's support. It recommended the establishment

of community councils with important responsibility with respect to the process of education (e.g., school budget, school regulations, communicating community school needs). The School Board was not prepared to transfer authority to community councils and was only prepared to accept such a body in an advisory capacity. The Commission also adopted the City's position that schools should become community centres and envisaged the facility as part of an integrated community life-support system. The Board, which saw its prime responsibility as the education of children, was reluctant to accept a position in which the requirements of 'regular' schooling would receive other than the top priority. An education system within a wider system was not acceptable to the School Board. There was also a concern that added responsibilities would not be accompanied by the necessary funds and that these services would draw on the educational dollars. This was perceived as a key reason for not pursuing the City's suggestion to consider a realignment of responsibility for educational and recreational services. A third area endorsed by the Commission and supported by the City was the reduced reliance on local taxes to support early and basic education. The School Board considered such a shift as one which would reduce the Districts' autonomy and flexibility to spend its resources on quality education at the level desired by the total community.

The Commission Report did not provide a clear direction on the issue of community schools although there is sufficient evidence to suggest that it supported a number of aspects of this concept. Finally, if, as claimed, the Commission's recommendations reflected the wishes of Albertans, then the School Board's position was at odds with a large component of its community.

Findings - Influencing the External Environment

In the opening remarks of the report, it was indicated that the work of the Commission "has been viewed as an instrument for mobilizing the time, talents and energies of Albertans in designing a system of schooling that will be a bridge for tomorrow" (Report of the Commission on Educational Planning, 1972, Introduction). The search for input on what Albertans believed should be the future of education in the province was used by the City of Edmonton, a focal organization in the metasystem, as an opportunity to voice an opinion about a vision for the education system. The City's submission identified its perception of what was wrong in the performance of parts of the metasystem.

Attempts to introduce changes following pressure from within the metasystem had typically been resisted by the Boards when such attempts were associated with control over activities taking place in school facilities or with the use of educational dollars for funding services other than the education of children. It was recognized by city administrators that changes in the performance of the education system could be achieved through alterations in the Boards' mandate and that this could only be done by the body that had delegated power to the school boards in the first place - the provincial government.

The City's submission, together with other presentations and briefs, seemed to influence the Commission to support positions which could have resulted in reduced control and power for school boards (although as indicated above, some of the positions are open to interpretation). Some of these positions were: (a) community control of the use of school space after school hours; (b) community decision-making powers over school operation (school councils); (c) reduced reliance on the property

tax for educational services and thereby possible reduction in boards' autonomy.

Implementation of the recommendations, as far as the Board was concerned, could have lead to a further erosion of school boards' freedom and authority. With the help of the Alberta School Trustees' Association, boards were successful in maintaining their role as the local 'government' of education and several of the Commission's recommendations were not accepted by the province. There is some evidence that thoughts expressed in the Commission Report had an impact on the views of some members of the legislative assembly (M.L.A.'s). An M.L.A. who several years later was appointed Minister of Education presented his views regarding local governance of education to the Greater Edmonton Teachers' Convention. An article in the Edmonton Journal (February 23, 1974) stated that this M.L.A. had proposed a new level of government - a "neighbourhood government" - which would be funded by the three levels of government and have specific powers in such areas as recreation, zoning and education. He suggested that trends towards this government already existed and that the existing levels of government would have to give up some powers and funds to the locally-elected neighbourhood government. The article suggested that this M.L.A. envisaged a school board with some central authority over several neighbourhood governments. Opposition to the idea came from several trustees and their provincial association. Additionally, a university professor in Educational Administration expressed concern about the proposal saying that "schools are already over-governed" (Edmonton Journal, February 23, 1974).

Provincial Approaches to the Use of Community Facilities

Introduction

The provincial government is an important component of the external environment of the metasystem. As indicated in Chapter 4, which describes the setting of the case study, it delegates the authority to the three local jurisdictions which are the focal organizations in the metasystem - the two school boards and the City of Edmonton. It can mandate certain activities or encourage local governments to follow a desired course of action.

This section of the chapter examines the provincial position on the community use of school space and the community school concept during the 1970's. Because Alberta's community school programs developed only in the later part of the 1970's, some of the documents examined originated after 1980, the end of the study period. Special attention will be given to the method chosen to implement the Province's desired directions, the status of community use of schools and the utilization of Joint Use Agreements across the province.

Background

Provincial endorsement was extended to the community school program. One of the characteristics of community schools, which are aimed at fostering a sense of a community, is the availability of school facilities for educational, recreational, cultural and social purposes, as well as for other community uses on an extended time basis daily and yearly (Interdepartmental Community School Committee, 1983). Even prior to the development and implementation of the community school program by the Government of Alberta in the second half of the 1970's, the

provincial government had been involved in the endorsation and support of the joint use of community facilities. In the following section, the provincial positions on the joint use of community facilities and the community school concept adopted in Alberta are briefly reviewed and the experiences in other jurisdictions in Alberta during the 1970's outlined.

Provincial Position on Use of Community Facilities

In 1973, the Alberta Department of Education and the Alberta Department of Culture, Youth and Recreation jointly published an information bulletin entitled Share It which contained a policy statement of the Government of Alberta regarding the joint use of community facilities. The policy statement, endorsed by the Alberta School Trustees' Association, the Alberta Urban Municipalities Association, the Alberta Association of Municipal Districts and Counties and the Alberta Recreation and Parks Association - all part of the external environment of the metasystem under study - indicated that:

The high cost of providing adequate educational and recreational facilities in each community, and the mounting tax burden associated with those facilities, is a matter of concern to all.

One way of minimizing these costs is for education and recreation to share facilities. Existing educational and recreational facilities can be jointly used, and new facilities can be jointly planned in ways which will benefit the community at large.

We commend those local authorities who have successfully completed agreements which implement the joint use of such facilities; we encourage those municipal and educational authorities who have not, to consider carefully the benefits to be gained through the principle of sharing.

We stand ready to assist, in every way possible, local authorities and agencies wishing to plan and develop school/community facilities and programs. (Alberta Department of Education and Alberta Department of Culture, Youth and

Recreation, 1973, p.3)

The document suggested that the concept of joint occupancy of community facilities would be widely supported and would not be limited to community use of schools but would include the schools' use of community recreational facilities. Furthermore, it indicated that the educational and recreational facilities need not be considered separately and that they should be planned for joint occupancy at the construction stage. The community use should not be limited to the gymnasium, since community groups can benefit from the use of ordinary classrooms as well as the more specialized spaces such as home economics, music, and industrial arts rooms. It is interesting to note that a similar position in support of community schools was taken earlier by the Edmonton Social Planning Council, which was led by the individual who co-sponsored the policy statement presented in the document entitled Share It, and who in 1971, was appointed to the position of Minister of Education.

Concerns for safeguarding school equipment and supplies are not addressed in detail. It was suggested that "adequate planning can lessen this possibility" (that equipment and supplies might be damaged). A similar response was provided to the identification of potential problems with the accommodation of public libraries in schools. With regard to the funding considerations related to new construction, the report emphasized the boundaries of the education system in the delivery of services to the community. It stated that:

School debentures funding applies only to those facilities needed by the school. If it is decided that community use of the school requires extra facilities (e.g. separate entrances, special kitchens, extra storage space, separate recreational dressing rooms), these extra facilities may be paid for by voluntary funding (for instance, service club fund raising); and/or through other funding procedures available to the municipality; and/or through recreation grants. (Alberta

Department of Education and Alberta Department of Culture,
Youth, and Recreation, 1973, p.10)

The experience of the Edmonton Public School District with the construction of a community wing attached to a school suggests that maintaining control over activities on the school site was considered more significant than securing funding to finance the construction of the wing. To the City's dismay, the Public School Board decided to pay the construction costs, maintain the title and control the activities within the community wing. The City was prepared to pay for the wing but required title and control over activities in it.

In January of 1975, following the release of the provincial policy statement on use of public facilities, the Ministers of Culture, Youth and Recreation, Advanced Education and Education, directed that interdepartmental co-operation take place in the development of community school policy for the province of Alberta. A tri-departmental committee known as the Interdepartmental Community School Committee was established in order to:

1. Delineate the community school concept.
2. Prepare recommendations regarding intra- and inter-departmental policy related to the concept.
3. Co-ordinate intra- and inter-departmental policy until such time as long-term policies could be established.

By September of 1975, following reorganization of government departments, four departments had representation on the committee. They were Alberta Advanced Education and Manpower; Education; Culture; and Recreation, Parks and Wildlife. A number of studies were commissioned by the Committee on topics related to the joint use of facilities in the province and the community school concept. As part of a study which

focused on the extent of community use of schools across the province and the kind of joint use agreements in existence in 1975-76, a telephone survey was conducted of all educational jurisdictions in Alberta operating one or more schools (Inter-Departmental Community School Committee, 1976).

The study of the use of public facilities showed that:

1. Community use of schools was at approximately 6% of its potential (based on fourteen hours per day, five days a week, excluding Saturdays and Sundays and adjusting for school use).
2. Weekend and holiday use of public facilities was very low.
3. The schools were not utilizing community facilities to a high degree.
4. The school space used by community groups was predominantly the gymnasium and regular classrooms. Little use was made of other spaces.

Examination of the extend of endorsation of community use of schools and the number and kind of agreements for use of community facilities that were in existence in Alberta during the 1975-76 school year revealed that:

1. Ninety-six percent (96%) of the jurisdictions supported community use of schools by having a policy on the matter or a joint use agreement in place. (N=137)
2. Educational jurisdictions located in cities demonstrated strong tendencies to accommodate community use through the signing of written agreements (15 out of 19 jurisdictions).
3. Small educational jurisdictions, especially those serving towns and villages, favoured verbal agreements in the accommodation of joint use of facilities.

4. About half of the jurisdictions did not allow the use of school equipment by community groups.

5. The signing of joint use agreements appeared to be a recent phenomenon in 1975, with the majority of the agreements having been signed after 1970.

A document developed by Alberta Recreation and Parks in 1979 in order to help in the development of joint use agreements indicated that the one-room school houses which had been an integral part of provincial educational history had accommodated a wide range of community activities. The report urged an improved utilization of public facilities stating that:

. . . ratepayers are demanding more and more accountability in the expenditure of public tax dollars. Elected officials and civic administrators will need to increase the use of existing and planned facilities to allow for greater community use. (Alberta Recreation and Parks, 1979, p.4)

The department's position in response to citizens' demands and expectations were expressed in the following way:

The concept of planning and constructing new community facilities for both school and recreation use is strongly supported by Alberta Recreation and Parks. Alberta Recreation and Parks also encourages the joint use of existing community facilities for both school and community use. (Alberta Recreation and Parks, 1979, p.3)

The Community School Concept in Alberta

The one-room school house mentioned above often resembled the ideal community school which the Inter-Departmental Community School Community envisaged for implementation in Alberta in the 1970's and beyond. The work of the Committee commenced in 1976 with studies of topics related to community schools, such as the financial implications of community use of schools. A number of drafts of community school policy, principles and

procedures were developed in 1977 and recommendations on community school policy were made during the years 1978 and 1979. The program which was eventually approved by the Alberta government in 1980 was implemented that same year and revised in subsequent years. A community school was defined as:

a school where, with the endorsement of the School Board in co-operation with other local authorities and on behalf of the community, there is formal commitment to the use of the education process for the individual and community betterment. There is also a formal commitment to consciously orient the school to the community it serves. (Interdepartmental Community School Committee, 1983)

The characteristics of a community school as envisaged by the interdepartmental committee and later approved by the Departments' Deputy Ministers, the Ministers and the Provincial Government include:

1. Real life situation in the community is studied using community facilities and resources. The school, by policy, encourages a constructive study of problems and issues of significance to the community.
2. Parents and other interested people are involved in providing advice regarding the school curriculum and in helping teachers with school operation through volunteer work.
3. A democratic, collegial philosophy is encouraged by the school board and the administration in the school operation and the parents and other interested people in the community are regarded as allies.
4. The education of the young is a priority, however, all members of the community are considered to be potential students (educational activities involving heterogeneous age groupings).
5. The school regards itself as an integral part of the total community education system. The school co-operates with other community

organizations and agencies to assist in the delivery of comprehensive educational, recreational, cultural and social services to people in the school attendance area and the facility is available for community use on an extended time basis daily and yearly.

6. Ideally, the school building is designed or modified to facilitate community use as well as to accommodate community education activities.

The position adopted by the province with regard to the community school program in Alberta stated that:

The Government of Alberta endorses the community school concept and will be of assistance, on a staged basis, in local implementation and co-operation of such schools in receptive Alberta communities. (Interdepartmental Community School Committee, 1983, p.2)

In an interview, the Executive Director of the Interdepartmental Community School Committee described the assumptions behind the provincial program, stating that:

Alberta Community Schools are more broadly and deeply defined than schools in general. The concept emphasizes extensive use of community resources in the curriculum; it involves many more people than schools in general, its audience is children and youth, plus the balance of the community. As we seldom get something for nothing in this life, it is assumed that more monies are needed to operate the school as a people place for the community, and for the people who work in the school.

It is assumed that community schools, by definition, require the involvement of teachers, students, parents, community at large and other agency people. This is simply a requirement of any school wishing to be a community school. It is putting one's actions behind one's words. The process of becoming a Designated Community School must be implemented to achieve designation (The process) involve(s) affected publics to set out your objectives, assign people most responsible to do these things according to timelines The process becomes a real learning experience. That is what development of a charter is all about. You can re-invent the wheel if you wish, but no school should be designated without this process, whether designated by the Inter-Departmental Community School Committee with the advice and consent of the local board,

teachers and civic government, or designated by the local board only.

The Inter-Departmental Community School Committee has placed controls on the rate of designation of community schools according to funding limitations. It has recognized that added direct costs would be associated with more comprehensive use of school and community facilities, and the operation of community schools. Therefore, grants to a maximum of \$73,480 per designated community school (1983 rate) were established to support such schools and the number of schools to be designated as community schools was limited. The Committee, which is still operational, is striving to develop at least 10% of the schools in Alberta as Community Schools by the year 1990. In Edmonton, eight (8) out of the one hundred and eighty-five (185) schools have been designated community schools and receive approximately \$600,000 annually from provincial sources.

There is a recognition that local community conditions vary and the methods of achieving the objectives of community schools were left in the hands of the local level and in the control of the school boards. One of the principles identified by the Government in the implementation of the program states that:

It is recognized that the schools are property administered by school boards as a trust for the community, and the Government is committed to working with respective school boards in facilitating public use of community school facilities for life long educational, recreational, cultural, health, social and other uses. (Interdepartmental Community School Committee, 1983, p.3)

Members of the Edmonton Public School Board administration have recommended, and the Board has approved, accessing additional provincial funds for selected community schools established in the district. However, there has been continuing dissatisfaction with the

identification of specific schools for "special treatment". It has been the District belief that all schools should involve their communities in the school operation and a preference was expressed by trustees regarding the allocation of resources to all schools.

Summary

The Provincial Government position in support of community and school use of public facilities provided the local jurisdictions in Edmonton with a provincial perspective and influenced the school boards in the direction of making school space available for community use. The Provincial Government did not mandate the existence of a joint use agreement, but rather took a more passive role in the form of commending and encouraging the signing of joint use agreements. It saw its role as working with the school boards to facilitate public use of community school facilities. Additionally, it provided some financial support for modification and design of facilities to enhance community and school use of public facilities and enabled space used by the community during the day to be exempted from districts' inventory which resulted in higher provincial support for capital projects. Although there was a significant increase in community use of schools during the 1970's, the limited provincial financial support and the school boards' reluctance to shift educational resources to accommodate the need for other services resulted in an actual utilization of facilities which was significantly lower than the potential use.

The introduction of the Interdepartmental Community School Committee in the second half of the 1970's and the introduction in 1978 of a program which included financial assistance in support of implementing

the community school concept had little impact on the Joint Use Agreement, although the availability of special funds resulted in improved utilization of school facilities in the designated community schools. The Joint Use Agreement was approved in principle in 1973, subject to resolution of land issues which were ultimately solved in 1980.

West-10: An Experiment in the Co-ordination and Integration of Human Services at the Local Level

Introduction

Reference was made earlier in this chapter to pressure from the external environment on school boards in terms of sharing some of their decision-making powers with local communities (e.g., school councils recommended by the Worth Commission on Education Planning, the 'neighbourhood government' of education proposed by an M.L.A. to the Greater Edmonton Teachers Convention). The case of activities within the external environment, examined below, provides insight into a development in other human services that had the potential of significantly restructuring the governance of education. This section describes the development of the experimental project, its evaluation and decline. Furthermore, it examines the role of the parties to the Joint Use Agreement in the experiment and highlights the position taken and the reaction of the school boards to the project and the request for funding by its representatives. The sources of information used in this examination are the consultant report recommending the project, the official and other evaluations of the experiment, reports in the media, Public School Board and City Council minutes and interviews with individuals who were associated with the project.

West 10: The Development of an Experimental Project

In 1967, the Mayor of Edmonton formed a Human Resources Development Committee which, a year later, presented a report entitled "Developing Edmonton's Human Resources." The report stated that, "our future concern should be with making life worthwhile; with humanizing the environment we have created; with ensuring that there are opportunities for individual development." Following the report's recommendations, two organizations were established: (a) a Human Resource Advisory Committee chaired by the Mayor and including a provincial cabinet minister, a federal representative, the chairmen of the two school boards and the presidents of the United Community Fund and the Social Planning Council and (b) a Human Resource Planning Group chaired by the Chief Commissioner and including staff representatives from some of the areas represented on the Advisory Committee as well as City Departments representing Social Services, Parks and Recreation, Planning and the Board of Health. The provincial Human Resource Development Authority was also represented in the Planning Group.

Early in 1970, the Planning Group called for proposals for the design of a three-year pilot project to operationalize the aims and objectives of the Mayor's Committee report. Leisure Consultants received the contract to design the pilot project for human development in the City of Edmonton. The consultants' report, submitted on September 1, 1970, describes their perception of the constraints on the delivery of human services, stating that:

The present nature of public services, the methods of delivery and indeed the very validity of some services are being challenged. The rights of narrowly elected boards and power group appointees to make decisions affecting large numbers of unrepresented people is being vigorously questioned. The right of individuals to have a direct voice in decisions that

directly affect them is no longer seriously challenged. (Leisure Consultants, The Design of a Pilot Project for Human Development in the City of Edmonton, 1970, p.2)

The consultants were critical of the political structure and the bureaucracy, which in their view stood in the way of the provision of quality services to the individual resident. In the first paragraph of their executive summary they stated that:

The goals of human development embrace a vast array of separate programs designed at meeting specific needs and presently provided in a manner reflecting jurisdictional fragmentation and political pressures. Decisions made are usually partial rather than comprehensive; too long in being formulated and diluted in efficacy by the time they have traversed the bureaucratic channels to the point of implementation. (Leisure Consultants, The Design of a Pilot Project for Human Development in the City of Edmonton, 1970, p.i)

The consultants argued that society was experiencing a significant shift in values, and to address the human development needs it was necessary to ensure (a) dignified and useful employment; (b) an education for future needs; (c) meaningful opportunities for participation in community programs, and (d) access to a system of health, welfare and social services. (Table 7.1 describes the perceived shifts in values) The consultants supported a pilot project for streamlining programs aimed at human development but stated that the intention was to extend the approach to the entire City.

The area recommended for the pilot project consisted of ten neighbourhoods in North West Edmonton with a 1970 population of about 40,000. The four objectives recommended for the pilot project were:

1. To test the feasibility of a unified approach to health, education, recreation, social and employment services on a decentralized area basis.
2. To determine the most effective geographic distribution of services.

Table 7.1
Shifts in Values

	FROM	TO
The Individual	endurance of distress puritanism conformity materialism self-control achievement competition narrow interest	capacity for joy sensualism individualism humanism self-expression self-actualization co-operation wide range of interest
Society	authoritarianism independence tradition oriented education to earn a living work orientation parochialism	participation - involvement inter-dependence future oriented - experimentation education for living leisure orientation global village concept
Organizations	mechanistic forms competitive relations separate objectives own resources regarded as owned exclusively	organic forms collaborative relations linked objectives own resources regarded also as society's
Strategies	responsive to crisis specific measures requiring consent short planning horizon standardized administration separate services	anticipative of crisis comprehensive measures requiring participation long planning horizon innovative administration co-ordinated services

Source: Leisure Consultants, The Design of a Pilot Project for Human Development in the City of Edmonton, Volume 1, September 1970, p.5

3. To evolve and experiment with ways of obtaining community participation in the decision-making process.
4. To innovate and experiment with new approaches towards providing opportunity for human development and evolving a more complete and satisfying community life.

(Leisure Consultants, The Design of a Pilot Project for Human Development in the City of Edmonton, 1970, p.21)

The operation of the pilot project commenced with the formation of an Interim Area Council consisting of 29 representatives appointed by various groups and organizations who had been invited to participate (e.g., public and separate school boards, community leagues, local action committees, churches).

The Mayor's desire to appear before the Board of Trustees of the Edmonton Public School District together with the Superintendent of Social Services and the Chairman of the Human Resources Advisory Council in order to provide information on the development of the pilot project emphasized the significance he placed on the project. The Public School Board minutes indicate that the Mayor "introduced the report covering a project that was geared towards integrating all facets of social services dealing with people, and involving citizens not only in participation but to be in control of these services" (Edmonton Public School Board, Minutes, June 15, 1971). The Superintendent of Social Services added that:

the concept was to co-ordinate all agencies serving the public, whether these be federal, provincial, civic, school board or private agencies. Education would not be part of these services but on the other hand, school boards would be closely involved.

The issue of who controls and directs employees - the parent organization or the director of the pilot project - was raised. In response to a Trustee question on the process of acquiring counselling

services, the Chairman of the Human Resources Advisory Council responded that people in need of counselling would go to the area counsellor who, in turn, would ask a school counsellor to take on the case. Another issue that was raised and which reflected the Board position on a number of other issues was the concern that schools would be moving into broader areas despite tighter financial restrictions. This concern that education dollars would be expended to support other services was also raised during the debate on community schools.

0— Over a two-year period following the commencement of the project, the number of services offered in the centre increased. The City's Parks and Recreation Department was the first unit to move into West-10 in October of 1971, and it was followed by the Social Services Department which established public assistance, juvenile probation and preventive services in December of the same year (School of Social Welfare, University of Calgary, 1973, p.II.3). In January 1972, West-10 People's Paper published its first issue and distributed it to area residents. During the year, programs such as Youth Involvement, and Mother's Day Out, commenced. Several organizations and government departments, including the Bureau of Child Study of the Edmonton Public School Board, Student Legal Services, Canada Manpower and Alberta Department of Agriculture, sent their employees to provide services to the area covered by the project.

An overview of the cost of operation suggests that, in the 1973-74 fiscal year, the centre had a \$116,248 core budget with an additional amount of \$117,604 (23 staff members were hired to undertake a community profile survey) provided through a federal Local Initiative Program. The salaries and benefits of the individuals seconded to the project amounted

to \$344,841. The revenue that formed the core budget came largely from a provincial grant (\$70,000) and municipal grants (\$20,750) with relatively small contributions from the United Community Fund and the two school boards.

On October 16, 1972, the West-10 Social Task Force (commonly known and referred to in this document as West-10) held its first annual meeting and election to the Board. The services continued to expand and included Household Handyman, Confidence Clinic and pre-school programs. Additional organizations also established services in the West-10 centre: the Consumer Association of Canada and the Community Relations Division of the City Police Department.

A chronological review of the centre's activities and services offered reveals that, in 1973, the centre experienced some changes. Several programs were terminated (e.g., Case Aid, Pre-school, Y.M.C.A. Youth Employment) and certain individuals resigned (e.g., Executive Director, Director of Social Services, Senior Citizen's Worker). This dissertation does not attempt to establish whether the resignations and termination of services resulted from a change in direction for the centre.

A review of West-10 minutes for the period from October 1972 to September 1973 suggested that the Council took a number of proactive positions on issues related to local services as well as services that had city-wide implications. This was part of the general leadership role that had been envisaged for the project. For example, the following motions were passed or actions, taken:

December 1972 Motions were passed that West-10 would offer the services of its newspaper to bring pressure on City Hall in support of Kiwanis Place senior citizens bus shelter

and that West-10 would support Child Battering Lobby through presenting issues in the newspaper.

- March 1973 A committee was set up to look into changes in the municipal tax structure.
- May 1973 A letter was sent to the Minister of Municipal Affairs with regard to West-10's comments on amendments to the National Housing Act.
- June 1973 A joint committee of West-10 and Edmonton Transit was formed.
- July 1973 A letter was sent to the Mayor and Council indicating displeasure with the time allowed to respond to Bylaw #4087.
- August 1973 A letter was sent to the Mayor and City Council supporting 149 Street Citizens Group in their request regarding transportation.
- September 1973 The Area Council endorsed the Westmount Committee submission on the Minimum Property Standard by-law.
- May 1973 The report of the Housing Committee was sent to the City of Edmonton, Members of Parliament and Opposition members.

During the West-10 budget deliberations conducted by the Human Resource Development Advisory Committee in January 1973, the uneasiness of the representative of the Edmonton Public School Board with the entire project became apparent. In response to a request by the Area Council for an increased contribution from the two school boards (from \$1,500 to \$2,250 each), the Separate School Board trustee indicated that she would recommend to her board an approval of the request, while the Public School Board's vice chairman suggested that the Board would need more information. He allegedly stated that, before the Board could give an answer, "they (West-10) have to explain the activities and philosophies of West-10 and explain the need for financial and other support" (Edmonton Journal, January 25, 1973). He indicated to the Committee that the feelings of his Board were that the money the Board did provide

should be spent on educational matters and that "we don't have money to hand out to various organizations." The vice-chairman conveyed also that the Board wanted to know what the long-term implications of the experiment would be.

Less than a month later, the Chairman of the West-10 Area Council appeared before the Board to present a report which outlined the services, assessed the development to that point, and requested approval of financial support. The presentation highlighted the provision of two types of services: social services and community programs (e.g., Parks and Recreation programs, snow shovelling services, household handyman, student legal services, book store, craft centre, mother's day out, youth development, all city development of self-confidence and publication of the People's Paper). It was suggested that West-10 was delivering high-quality service at a lower cost. Despite this plea, the Board decided to await a request from the Mayor's Committee on Human Resource Development - sponsor of the project - before making a decision on the budget request.

The Project Evaluation

An evaluation of the pilot project was perceived to be necessary before the completion of the third year if the project was to continue. The Human Resource Planning Group accepted a proposal from the School of Social Work to undertake the evaluation of the project. A report submitted on November 30, 1973 entitled "West-10: An Incomplete Journey" attempted to relate the findings of the study to the experiment's goals and to decide whether the experiment should be continued and if so in what form. In addition, numerous observations were made with regard to

the centre's operation and data was shared on various groups' perceptions of the service offered.

The project's first objective of testing the feasibility of a unified approach to health, education, recreation, social and employment services on a decentralized area basis was difficult to achieve. West-10, it was suggested, could more readily be categorized as an example of a "co-operative co-existence" rather than an "integrated co-existence". The existence of a parent organization which seconded individuals to provide services within specified requirements made the local integration and local control of the service virtually impossible. The evaluation report stated that:

The connective lines from West-10 service to "parent" agency are quite strong, with service policy, personnel policy and procedures for work reporting emanating from the latter. West-10 has in fact been in considerable degree an association of services brought into physical proximity, all sharing in the general goals of social service to people, but each performing within its own boundaries and in its own terms. (School of Social Welfare, University of Calgary, West-10: An Incomplete Journey, 1973, Vol. 2, p.8)

Integration would have required the various parent organizations to transfer some of their legislative authority to the Area Council. Voluntary transfer of power would not have been a course of action which the Public School Board would have taken considering the Board commitment to the education of children, and its belief that maintaining all of its power was essential to fulfilling that commitment. Furthermore, the provincial government was not prepared to delegate power to community groups nor to establish another layer of local government.

The second objective of the West-10 experiment was to determine the most effective geographic distribution of services. The report suggested that the area was too small for agencies that needed to draw on a large

population base such as the entire city and was too large for groups like the Community Leagues that were organized to serve only a few neighbourhoods. The report was critical of planning that was based on the incorrect assumption that central physical location was the key factor (a one-stop service) in effective service delivery.

To experiment with ways of obtaining community participation in the decision-making process was the project's third objective. The existence of the corporate entity and the establishment of the area council were perceived as the major innovative accomplishments, but overall "West-10 has not been as experimental or innovative in the area of citizen participation as its founders may have hoped." The introduction of multiple services into one corporate entity was an innovation within the province of Alberta, although the approach had been tried in other places in the 1960's. The extent of service provided was perceived by the evaluators to be an evidence of client satisfaction and an indicator that the project contributed to the life of the community (the fourth objective) although they observed that primary client identification might not be with West-10 itself but rather with the specific service accessed. About 12% of the area's residents accessed at least one of the centre's services during a calendar year. The volunteers also observed that, while West-10 was a centre for service, it was hardly a community centre whose location invited informal drop-in.

The evaluation report's conclusion with regard to the future of West-10 was that:

West-10 is doing a creditable job of delivering public services at a reasonable cost. There is no strong indication that anyone is anxious to see the West-10 corporation terminated. There is some indication that residents of the area are better served because West-10 exists. We cannot argue that West-10 should not continue. However, we are convinced that West-10

represents aspirations that are as yet largely unfulfilled.
 (School of Social Welfare, University of Calgary, West-10: An
 Incomplete Journey, 1973, Vol. 1, p.4)

The evaluators' proposal was to let West-10 continue to operate but to implement changes to improve its chances of effectiveness. In addition, it was suggested that another project commence with similar goals but a different design to reflect what had been learned from West-10 and that a research unit be established to compare these experiments and other Edmonton service centres.

Examination of some of the areas that were perceived to require change highlights a number of the potential implications to the Public School Board if the project had been allowed to proceed along the course suggested in the original design, or if the evaluators' proposals had been adopted.

The evaluators identified the Area Council's dilemma of serving two functions: providing improved services to area residents as well as undertaking a social advocacy role. They expressed the belief that it was very unlikely that control of statutory services would be decentralized to urban "sub-communities" under open permissive legislation and therefore, the Council's power would not only be limited, but the expectations would be that it would accept some "handed-down" policies if it were to continue to exist. The suggestion advanced was that if the role of providing general community leadership was to be maintained, then the council should: (a) undertake to be fully informed on the policies, procedures and practice of every West-10 service; (b) receive input from agencies, consultants and staff which would enable it to analyze those services provided; (c) operate as a service critic, organizing data from experience and then developing service

accommodations to be communicated to the public and to policy decision-makers with the intent to influence improvements in policy and procedures; and (d) be prepared to have the agency and itself act as advocate for the agency's clientele and the community's residents (School of Social Welfare, University of Calgary, 1973, Vol. 2, p.24).

The evaluation team was also critical of (a) the lack of a built-in research facility, (b) the planning approach which was reactive rather than proactive in nature, (c) the administration control which resulted in West-10's having insufficient knowledge about its own affairs, (d) the reliance on temporary sources of funding for 10 of the 17 services provided and (e) the inadequate public relations efforts which resulted in a "total lack of understanding as to the West-10 concept", among the ten community league presidents in the area.

The Public School Board's Attitude Towards West-10

The notion that a body elected by the residents at large would have a permanent "watch dog" function and would lobby in support of specific policies that might reflect local needs or stem from values and ideologies not perceived to be those of the community as a whole was not supported by the Edmonton Public School Board. Furthermore, allowing secondment of staff under local personnel policies which would have meant external intervention in the affairs of the organization and loss of control on the part of the Board, would undoubtedly have been rejected out-of-hand - especially since such a "sacrifice" would have been for a concept in which the Board did not believe. The value contexts typology (Dunn, 1981) used in a previous section to analyze the policy related to alcohol in schools is relevant in this case as well. The value judgement

related to the role of an elected body representing the interest of the general community is contrasted with a value statement representing the interest of a group of individuals in the community.

Support for the statement about the School Board's commitment to the West-10 concept and project was evident in the interaction between trustees and the administration during a discussion of a request from West-10 for extension of the Board's financial support for another six months (from March 1974 to September 1974). The administration suggested that there was no particular advantage to the location of the Edmonton Clinic in West-10 and that the area served by the unit covered a geographical area which was wider than the West-10 boundaries. Furthermore, it was indicated that, after September 1974, West-10 would charge rent for the space that would be used.

Trustees' comments reveal their position regarding the project. One trustee referred to the evaluation mentioned above and indicated that he was not impressed by the research report on West-10 and was reluctant to continue to finance the project. Another trustee expressed concern that the original concept was for funding for a three-year period and after that the community was supposed to make it self-supporting. There was no comment from trustees in recognition of the services provided by West-10 and the decision was to defer the matter until information regarding the position of other organizations on extending the funding was available. This position was taken despite the fact that the Board was in receipt of a letter from the Mayor asking the Board to continue its support of West-

The Decline of West-10

Following the evaluation, West-10, which had about sixty employees and an even larger number of volunteers, began to reduce the number of both services and employees. A review of related articles in the Edmonton Journal following the release of the report suggests a continuous struggle to secure funding and overcome reduced support to the project.

An article in the December 20, 1973 issue of the newspaper entitled "West-10 Experiment Less Than Perfect, Admit Evaluators" suggested that some members of the Human Resources Development Group had strong reservations about the project's goals and doubts as to whether citizen involvement in running the social service centre resulted in better and more services, or only in more confusion. The article quotes from the report to suggest that one of the problems faced by the area Citizen's Council at West-10 was that "Citizen control of policy has been constrained within the boundaries of policy established by statutory agencies."

A recent interview undertaken by the writer in the process of validation of data revealed that individuals who were extremely committed to the idea of service integration and local decision-making suspected that, while the Mayor's intentions were genuine, the experiment was a "token" and had little chance to succeed from the outset. The main reason for this was the unwillingness to transfer power to sub-community groups through legislative changes.

The decline in public interest in the West-10 project was evident in the October 2, 1974 election to the Area Council. Only 45 individuals turned out to elect the 15-member council and only 8 individuals

interested in standing for election could be found (Edmonton Journal, October 30, 1974). A few days later, an article was published in the Edmonton Journal which suggested that the City's Director of Social Services had stated that the City and the province could not support all the services operated by West-10 since some of them were based on past funding from the federal Local Initiatives Program grants. He apparently expressed concern that funding such projects would set a precedent and asked, "Are we prepared to do in every area what we're doing for one?" (Edmonton Journal, September 4, 1974).

An article published a few years later described a new city initiative for decentralizing community services including Parks and Recreation, Social Services, health clinics and library branches into 12 separate areas (April 11, 1977). The article suggested that the units would share space but not be integrated. Integration, it was suggested, had been tried in West-10 but "it did not work." It was ambiguous in that "employees' loyalties were torn between head offices and the supervisors in the West-10 offices." In describing the decline of West-10, it indicated that the core budget had dropped from a peak of \$116,000 (excluding salaries of seconded employees) to \$59,000 in 1976. A large majority of the budget funds in 1976 came from the city (\$54,000) and the balance was contributed by the United Way. The reference to the School Board withdrawal suggested that the Board could not rationalize spending money on office rental when it owned property - i.e., schools - all over the city.

The reduced revenues which further declined to \$43,200 in 1978, necessitated the sale of surplus office equipment and the termination of the newsletter. At the same time, local as well as external interest

continued to decline. The difficulties in finding members to serve on the Council necessitated a shift from elected to appointed representatives. The decline in interest reached a new low when only two representatives of the public attended the December 1977 meeting (Edmonton Journal, December 19, 1977). When West-10 organized a strategy meeting to save its operation about six months later, only four of the ten community leagues were represented. The representative of Grovenor Community League may have reflected the local understanding of what had happened to West-10 by saying that:

- Although West-10 has been successful, similar agencies haven't been set up. The mayor says he wants more communication with the communities and West-10 is a vehicle for that, and yet it seems to be going off track and into areas where the city doesn't want it to be so funding is decreased. (Edmonton Journal, June 26, 1978)

The support for West-10 among the presidents of the ten local community leagues was limited, even in the early 1970's. The 1973 evaluation report suggested that there were as many presidents that somewhat opposed the continuation of the project (4) as those that were somewhat positive towards such a proposition (4). One was neutral and one did not respond.

A hypothesis that can be advanced in an attempt to explain the "rise and fall" of West-10 and possibly the entire pressure placed on the Joint Use Agreement in the early 1970's is that a change in social values which reflected public expectations was the main factor associated with the phenomenon. What were once perceived as acceptable demands for decentralization of decision-making, integration in order to achieve improved local services and for a focus on the individual's desires were no longer issues to fight for. Marches on city hall, individuals designing their own neighbourhood plans, forums in opposition to policies

are no longer an almost weekly occurrence in the 1980's as they were a decade earlier. Individuals interviewed who represented different organizations both within and outside the metasystem were able to verify that, in their view, public expectations and the values of the 1950's were much closer to those of the late 1970's and the 1980's, than those exhibited during part of the 1960's and the early 1970's. The Leisure Consultants' report, which introduced the initial design of the experimental project, made reference to a value change and indicated that their proposal was attempting to reflect the new values (see Table 7.1). It is possible that the second half of the 1970's brought back some of the "old" values. The experiments of the early 1970's may not have gotten off the ground in any other period of time.

Summary

The introduction of an experimental project in West Edmonton aimed at the co-ordination and integration of human services in the local area was a response to community pressure during the late 1960's and the early 1970's to decentralize decision-making, reduce red tape and involve people in decisions that affect them. The City of Edmonton played a major role in the introduction of the project with support coming also from the Federal and Provincial level of government. The two School Boards were invited to participate in the implementation of the multi-service centre by providing some financial contribution and the Public School Board was asked to place a unit of the Bureau of Child Study in the Centre. The invitation to participate in the experimental project resulted in trustees inquiries: Where is such a project headed and what could be the long-term implications? Trustees were never given a direct

answer about the potential implications of such a project to the educational system, but their reaction, comments and the position ultimately taken with regard to the project leave little doubt that they were aware of the potential implications. The new political party in power, the appointment of a former Chairman of the Social Planning Council as the Minister of Education, and the involvement of this Council in the experimental project may have been additional elements which resulted in the Board's cautious examination of the development of this project. It was ready to protect its domain: the provision of educational services to children within the City of Edmonton, and was not prepared to shift resources from education to ensure the continuity of the project.

Some would argue that the project did not have a chance to succeed from the outset because the Province was not prepared to delegate legislative power to community groups nor was it prepared to establish another layer of government.

Summary of the Chapter

The phenomena examined in this chapter could have led to an erosion in the school boards' freedom and authority and thereby would have changed the nature of the Joint Use Agreement. New power bases such as the Area Councils referred to in the West-10 experimental project or the Community Councils proposed by the Commission on Educational Planning had a potential impact on the content of the agreement and the parties who negotiated it. However, the Provincial Government was not prepared to delegate legislative powers to community sub-groups, a fact which enabled school boards to maintain their control. Significant public pressure for

change resulted from several factors: (a) the desire for institutions to become more responsive to public needs; (b) the wish of communities to have some power over decisions affecting them and the education of their children, and (c) the desire to see expensive public facilities more fully utilized for numerous community activities. This was illustrated in the attempt of the West-10 project to improve human services to the individual resident by the integration and co-ordination of the services at the local level. It was also reflected in the City's brief to the Alberta Commission on Educational Planning and in the latter's final report. The Commission undertook an extensive information collection process and toured the province in order to gauge the wishes of the citizens of Alberta. The general mood in favour of change which was evident in the late 1960's and the early 1970's may have been a result of a change in societal values. The Edmonton Public Board was aware of these changes in societal outlook and attempted to maintain its control by refusing to extend its domain beyond what trustees perceived to be the duty for which they had been elected - the provision of quality education to children. It refused to be drawn into providing additional services to the community and took action to guarantee that its expenditure of funds would be directed towards the education of children. This was evident in the Board's reaction to the request to extend financial support for West-10 and was also reflected both in the nature of its brief to the Commission of Educational Planning and in its reaction to the Commission's recommendations.

The position taken by the provincial government was not one of mandating changes. It encouraged and recommended the signing of joint use agreements across the province as a means to effect an improvement in

community access to public facilities. However, the decision was to work with boards in order to bring about change. The timing of the introduction of the Community School Concept may have been related to the approach chosen to implement the program. During the late 1970's and the early 1980's, the atmosphere in the City changed and the vocal demands for community control of schools after school hours and for local decision-making power over school affairs diminished significantly. The non-coercive approach adopted by the Government to implement the community school concept may be a reflection of several variables including the very nature of the concept, which may not be suited to all schools, the reduced pressure by the broader community, and the recognition that such decisions should remain with school jurisdictions.

Concluding Remarks

The reason for focusing on certain events originating within the external environment of the metasystem was to gain insight into perceptions, preferences and activities operating outside the metasystem but dealing with relevant issues and to subsequently examine how this activity was related to behaviour within the metasystem.

The issue of the metasystem's boundary proved to be a complex one. For example, examination of the submissions to the Commission or Educational Planning revealed that the focal organizations were attempting to influence a powerful external environment to perceive the future of education in their preferred way. In so doing, each hoped to create for itself an advantageous position in relation to elements of controversy associated with the Joint Use Agreement. Another example which illustrates the difficulty in the setting of clear metasystem

boundaries was related to the Provincial Government, which was considered to be part of the external environment by virtue of the fact that it operates beyond the geographical area of Edmonton. On the other hand, the Government was involved directly with the Joint Use Agreement in Edmonton since Ministerial approval was required before such an agreement came into effect. Thus, in this case, a clear distinction does not exist between what is internal to the metasystem and what is external to it.

Another issue is the timing of the pressure for change. One could hypothesize that the pressure placed on the Joint Use Agreement both from within the metasystem and from the external environment in the early 1970's reflected a change in social values. What were once perceived as acceptable demands for decentralization of decision-making, for integration in order to achieve improved local services and for a focus on accommodating individual desires were no longer issues to fight for. Marches on city hall, individuals designing their own neighbourhood plans, forums held for the purpose of expressing opposition to existing and proposed policies were no longer an almost weekly occurrence in the 1980's as they had been a decade earlier. Individuals interviewed who represented different organizations both within and outside the metasystem were able to verify that, in their view, public expectations and the values of the 1950's were much closer to those of the late 1970's and the 1980's, than those exhibited during part of the 1960's and the early 1970's. The Leisure Consultants' report, which introduced the initial design of the West-10 experimental project, made reference to a value change and indicated that their proposal was attempting to reflect the new values. It is possible that the second half of the 1970's brought back some of the "old" values. The experiments of the early

1970's may not have gotten off the ground in any other period of time. The same could be said about the report of the Commission on Educational Planning. A decade later, its content and recommendations would likely have been completely different, reflecting the contemporary societal values and public expectations.

CHAPTER 8

SUMMARY FINDINGS AND IMPLICATIONS

Introduction

This chapter commences with a brief overview of the study. It then reviews the findings by addressing the sub-problems and relating them to concepts from interorganizational theory, identifying the practical implications of these findings and suggesting areas for further research.

Overview

This section outlines the problem statement and the limitations of the study, lists questions addressed in the review of the literature and summarizes the conceptual and methodological frameworks.

Problem Statement

The purpose of this study was to provide a review of historical developments associated with the Joint Use Agreement among organizations providing educational and recreational services within the City of Edmonton and to analyze the problems associated with the agreement using concepts from interorganizational theory.

Delimitations

The study was confined to the geographical area of the City of Edmonton although elements of the external environment extended beyond

the city boundary. It was also limited to those events associated with the Joint Use Agreement which took place during the period 1970 to 1980.

Literature Review

The review of the literature addressed the following questions:

1. How does organizational theory view the environments of organizations?
2. What does the literature tell us about the interaction between the organization and its environment?
3. Why do organizations engage in interorganizational relations?
4. What do we know about the properties of linkages among organizations?
5. What approaches and frameworks have been used to analyze interorganizational relations?
6. What is the basis upon which policy-makers make their decisions?

Conceptual Framework

The conceptual framework used in this study was that of a metasystem and an external environment. The metasystem was comprised of three focal organizations: the City of Edmonton, the Edmonton Public School District and the Edmonton Separate School District. Groups and individuals within the City who were involved in maximizing community use of public facilities (the metasystem goal) were also considered to be part of the metasystem. The external environment consisted of the general and task environments.

Methodological Framework

A descriptive and interpretive case study employing qualitative research strategies was deemed to be an appropriate methodological framework for this study. An historical case study approach was used to study the Joint Use Agreement. The main sources of data for this study came from interviews and document searches. Documents used included historical organizational documents, related reports, newspaper articles and letters. Triangulation was a key method used in analyzing the data.

The Sub-Problems

This section briefly addresses the first seven sub-problems identified for investigation in this study. Sub-problems numbers eight and nine are discussed in the section which presents the findings from an interorganizational perspective.

Sub-problem 1: Why was a formal Joint Use Agreement perceived to be necessary?

The study revealed that the early formal agreements stemmed from the desire to ensure that future administrators would understand and follow the terms of the agreement. The perceptions regarding the rationale for having a formal agreement varied considerably among individuals who were involved with the agreement during the 1970's. The variations seemed to reflect the level of the individual's position in the organization as well as his/her area of involvement. The reasons seen by individuals for having a formal agreement included: to recognize the organizations' respective responsibilities, to guarantee City access to surplus school space, to ensure availability of school grounds and facilities for public and school use, to establish the basis for dividing reserve land between

parks and schools, to enable the City to access debenture borrowing and to allow significant savings through combined site design.

Sub-problem 2: What is the nature of the exchange relationship among the parties? Is it reciprocal?

The exchange under the Joint Use Agreement made school buildings available for recreational purposes including activities sponsored or operated by the City's Parks and Recreation Department. In return, this department planned, developed and maintained school grounds and made its facilities available to school boards during school hours. In addition to this exchange, the City would acquire land for school use and transfer the land title to the appropriate board prior to the commencement of construction. In return, reserve land no longer required by the boards would revert back to the City. The agreement also stipulated that non-reserve land acquired by a board at market value would be purchased by the City at a cost of 75% of the market value of the adjacent land.

The intensity and the reciprocity of the exchange were examined in terms of the financial contribution of each of the three parties. The study indicated that it was not possible to establish whether or to what degree the exchange was reciprocal since the parties could not agree on the method to be used in calculating the extent of their respective contributions. Application of two possible methods of calculation, the incremental and the full-costing methods, each suggested an imbalance in expenditures favouring a different party.

Sub-problem 3: What problems contributed to the renegotiation of the Joint Use Agreement?

The agreements prior to 1970 were described as "gentlemen's agreements" and functioned to a large extent through the good will of the

respective parties. The perception among selected city officials that the schools belonged to the community brought about the demand for a prescriptive agreement that would guarantee the right of the community to use schools. City administrators also had difficulty with an agreement which they saw as too flexible in nature and lacking specificity. They felt it resulted in misinterpretation of the rights and responsibilities of the respective parties, in particular at the operational level, and led to tension among them.

The reluctance of the School Boards to widely implement the community school concept and the Public Board's objection to providing local communities with total control over activities in community wings after school hours were major factors leading to the establishment of the Joint Use Agreement Review Committee. This Committee served as a forum for discussing and debating desired changes to the agreement.

Sub-problem 4: What were some of the pressures originating from within the metasystem which were associated with the position of the fecal organizations on the Joint Use Agreement?

The study focused on three conflicts within the metasystem. In two cases - the community school issue and the consumption of alcohol on public school property - pressure was placed on the school districts by the City and local groups to give up authority and control over their facilities after school hours and to provide community groups with autonomy and decision-making power. The third conflict centred on the City's position on land ownership which questioned the School Boards' belief that they should own the grounds adjacent to a school. The Boards felt they had to guard against infringement into their domain and jealously protected and defended the interests they had been elected to

serve - the education of children. Any proposal that had the potential for redirecting educational dollars to activities beyond the School Boards' mandate was viewed suspiciously and usually rejected. The demands made by city aldermen in the process of reviewing the Joint Use Agreement were seen in a similar light and rejected by the representatives of the School Boards.

Sub-problem 5: What were some of the pressures upon the focal organizations originating from the external environment which were associated with their position on the Joint Use Agreement?

Pressure from the external environment was illustrated in the form of potential loss of authority through a shift of legislative power. The implications of establishing city-wide Area Councils, referred to in the West-10 experimental project, or the Community Councils proposed by the Commission on Educational Planning could have eroded the School Boards' freedom and authority, thereby changing the nature of the Joint Use Agreement. The desire evidenced in the external environment for decentralized decision-making power reflected the general public pressure for institutions to become more responsive to public needs. There was a strong wish for communities to have some power over decisions that affected them and for public facilities to be more fully utilized by the community.

The provincial reluctance to delegate legislative power to community sub-groups and the non-coercive approach adopted with regard to the implementation of the community school concept made the School Boards' task of maintaining control over activities in schools an easier one.

Sub-problem 6: What changes were incorporated in the new agreement and did they address the concerns of those that demanded the review?

The 1980 Joint Use Agreement included Schedules "A" and "B" which dealt respectively with monitoring the parties' expenditures related to the agreement and with the acquisition and disposition of land. In addition, reference was made to regulations governing the use of schools, use of parks and recreational facilities, and parks/school site standards. Schedule "A" proved to be impractical and has not been adhered to by the parties. Schedule "B" represented a resolution of the land controversy and gave the Boards the right to own the school grounds and receive reserve land but required the return of that land to the City when it was declared surplus to a district's needs. The City, for its part, was required to purchase non-reserve land from the Boards at 75% of market value of adjacent land.

Sub-problem 7: How did the Joint Planning Committee operate in addressing problem areas in the 1970's?

The Joint Planning Committee, established in 1959 to serve as a coordinating mechanism, was responsible for the implementation of the terms of the agreements. During the early 1970's, a period of tension among the focal organizations, the committee was unable to bridge the gap in the positions of the respective parties. The members vigorously presented their organizations' views and there was little appreciation of the other parties' position. The atmosphere in the meetings was one of mistrust and suspicion among committee members, a fact which led to the dissolution of the Joint Planning Committee.

The committee was unable to resolve the problems within the metasystem, and for a number of years during the 1970's it was inactive. Following approval in principle of a draft agreement in 1979, the committee was revived. However, its structure lent itself more to

dealing with operational difficulties rather than with disagreements and controversy at the institutional level.

Sub-problems 8 and 9, listed below are addressed in the following section which discusses the study's findings from an interorganizational perspective.

Sub-problem 8: Is the interorganizational collectivity an appropriate conceptual framework for the study of the Joint Use Agreement?

Sub-problem 9: What significant issues and themes emerge from this regard that are of relevance to the analysis and understanding of interorganizational relations generally?

Discussion of Findings from an Interorganizational Perspective

Introduction

This section examines the appropriateness of the metasystem as a conceptual framework for the case study and reviews the findings as they relate to the metasystem's boundaries, structure and external environment. Another concept from the field of interorganizational relations discussed in this section is the shift from equilibrium to disequilibrium and vice versa. The findings shed some light on the rationale for entering into the joint endeavour and the dimensions of the interorganizational relations.

The Conceptual Framework

The conceptual framework of this study was based on the concept of a metasystem which was defined as a collection of subsystems working towards the achievement of individual as well as common goals. The two

basic assumptions that were made in applying this methodological framework to the case study were that:

1. The metasystem activities are more inclusive than those activities undertaken by the organizations in direct interaction.
2. The activities of the metasystem are performed by more than just the organization.

The study confirmed these two assumptions. In a number of events and activities, groups such as the Edmonton Social Planning Council, the Federation of Community Leagues and the individual community leagues had an impact on the interaction. Not only were there groups but also individuals involved whether in a vote or a plebescite or a presentation to Boards in support of a cause related to the Joint Use Agreement. This concept is somewhat similar to the interorganizational collectivity which was perceived as a social action system in which two or more organizations join together in order to attain specific objectives or identified goals (Van de Ven, Emmett and Koenig, 1974). While the concept of a metasystem including organizations, groups and individuals interacting in the process of goal attainment proved to be useful in emphasizing the significance of parties beyond the focal organizations, the collectivity concept and its underlying assumptions proved to have little utility in this case study. The operation of the Joint Use Agreement could be better described in terms of a venture of independent parties than of a collection of partners.

Van de Ven, Emmett and Koenig (1974) argued that an interorganizational collectivity, as a social system, must solve four functional problems in order to survive: goal attainment, integration, adaptation and instrumental pattern maintenance (ensuring that the value

and norms of the participants are consistent). Further, they suggested that the collectivity can act as a unit and each participant can make decisions to attain the goals of the system which are binding on the collectivity as a whole. These conditions did not characterize the metasystem under study. The school boards' primary goal was that of delivering educational programs, but because they recognized the community desire to have access to schools, they were prepared to enter this "joint venture." Although the agreement served as a basis for dividing reserve land among the parties and included services provided by the City it was all considered secondary by the boards to the main purpose of providing education to children. Engagement in such endeavours was conditional on their not interfering or detracting from the main goal. Additionally, the decision of one party (the City) with regard to goal attainment did not bind the other parties in the collectivity.

Other conditions required for the survival of a collectivity did not correspond to the metasystem under study. There was no integration nor were the values and the norms of the participants consistent. The analysis of the conflict over the consumption of alcoholic beverages in schools revealed a wide gap between the two camps. There was also a perceived difference in political ideology between the two sides in the dispute. A number of influential individuals in the City's camp in the early 1970's held political views which lay to the left of centre on the political spectrum (Liberals, New Democrat). The Public School Board camp, on the other hand, included influential individuals that could be considered as being right of centre in their political ideology (i.e. Social Credit, Conservative). The values and norms reflected in the

briefs submitted by the Public Board and the City of Edmonton to the Commission on Educational planning were not consistent with each other. Not only was the gap in the content significant, but the independent submissions, made without consultation, could be interpreted as a call upon the external environment to influence activities within the metasystem.

The independent positions of the parties reflect the distribution of power delegated to them by the provincial government. The fact that the school boards are formed and empowered under the School Act and have rights and responsibilities pertaining to the education of children, while the Municipal Government Act mandates certain other requirements and provides discretionary powers to the City pertaining to recreation and other community services, by its nature does not encourage integration of services. An important factor in the failure of the attempt to integrate human services at the local level (the West-10 experimental project) was the reluctance of the provincial government to grant the area council legislative power. It did not want to create another level of government by giving power to sub-groups and taking away from boards. As a result, the services were controlled by those responsible for the particular service sector rather than by those who tried to integrate them and probably reflect upon the focal needs. Integration would likely have occurred only under conditions which threatened survival or which were forced by legislation.

These findings are in line with Zeitz' (1975) claim that in studies viewing interorganizational relations as social action systems the functional autonomy of the parts of the interorganizational collectivity is underplayed and the degree of integration is merely assumed.

In Search of Equilibrium

Another concept which characterizes a social or biological system is the shifts from equilibrium to disequilibrium and vice versa. Hoy and Miskel (1982) suggest that equilibrium exists when the parts of the system maintain a constant relationship with other parts. Disruptive stresses upset this equilibrium and create temporary periods of disequilibrium. In response to the new state, the system either adopts and changes or neutralizes the disruptive forces in order to achieve a new equilibrium. This process was evident in the case study. After relatively calm periods in the 1960's following the signing of the 1966 agreement, new waves created stress among the parties to the agreement in the form of extending community use of school space and local control over the use of schools after school hours. The pressure was placed also on the City to support local causes advocated by influential groups (e.g., Federation of Community Leagues, Edmonton Social Planning Council). The response reflected adaptation in the form of establishing community school pilot and drop-in centres. On the other hand, the Public School Board also demonstrated resistance to change through the use of a plebescite with regard to the use of alcohol in schools. Following a tense period between 1971 and 1974, there was a period of equilibrium until the relations within the metasystem were strained as a result of the conflict over the ownership of land and later the proposed zoning by-law which had major negative implication on the value of the school boards' properties. The parties were eager to solve the land controversy and restore the equilibrium. This was achieved with the signing of the Joint Use Agreement in 1980.

Metasystem and Organizational Boundaries

The findings in this study pertain to two aspects of boundaries. Firstly, the boundaries established for the metasystem in the design of the case study are considered, and secondly, boundary maintenance activities of a focal organization in the study are related to the literature dealing with interorganizational relations.

A number of references are presented in the literature with regard to boundaries of organizations and systems. Katz and Kahn (1966) and Thompson (1967) indicate that in an open system model of organizations, boundaries are more problematic than in Weber's model of bureaucracy. Aldrich (1971) and White (1974) highlight the difficulties in delineating a system's boundaries. In the same context, Laumann, Galaskiewicz and Marsden (1978) suggest two criteria for the delineation of the relevant population - the functional and geographical domains. The functional interdependence of the population or the sharing of common collective goals were also suggested as major criteria for the identification of a collectivity. This study followed the suggestion of Lauman, Galaskiewicz and Marsden (1978) and applied geographical and functional criteria for determining the metasystem's boundaries. The boundaries included the City of Edmonton and the organizations, groups and individuals directly involved in activities pertaining to the content of the Joint Use Agreement. Although the use of these criteria was helpful, a number of difficult elements still remained. For example, the provincial government, including the departments of Education and Municipal Affairs which operate throughout the entire province, was considered to be part of the external environment. A review of the evolution of the agreement in the context of the School Act suggested that the agreements signed

prior to 1970 were not valid because they were not approved by the Minister of Education in accordance with the requirements of the School Act. Such a direct involvement, which included a meeting with representatives of the respective parties prior to granting an approval to the agreement, necessitate the inclusion of the Minister of Education as part of the metasystem while keeping the Department of Education within the external environment.

Organizations, defined as boundary-spanning systems of human interaction, are suggested to have many boundary control problems. Aldrich (1979) states that authorities attempt to preserve the integrity of an organization's boundaries and the stability of its structure by controlling entry and exit in terms of personnel, products and services. In this case study, the facilities of the respective parties are considered to be a major resource. Controlling access to these facilities and determining the activities within them were considered as means of controlling entrance. This control was applied in the form of limiting the approvals given for summer use of schools and community school projects. These measures for controlling entry were put in place to a large extent by the desire to avoid massive expenditures of educational dollars on activities beyond the mandate of the Boards. Another means of entry control was to restrict the consumption and sale of alcoholic beverages on Public School Board property. This was considered as preservation of the organization's integrity by those who strongly believed that alcohol and education did not mix.

Boundary control problems according to Aldrich (1979) make organizations susceptible to external influence. The environment outside an organization, which includes clients and customers, has a variety of

options when dissatisfied with organizational performance and seeks greater responsiveness from the authorities. The options include: exit, voice, offering inducement and doing nothing. It is suggested that exit is a more likely course of action when other alternatives are available, and a lack of feasible alternatives would increase the likelihood that voice will be chosen by discontented customers (Aldrich, 1979). In terms of the use of school facilities and their grounds, Parks and Recreation programs and other community activities had no options because in many neighbourhoods the Edmonton Public School Board owned the only public building in the area. The option of constructing a community hall was considered to be suboptimal since the expense meant that not every neighbourhood could build one. In addition, space such as the dressing room, storage and other community facilities were located farther away from the school gymnasium, home economics room and other school spaces which the community could use. In the case of the community wings discussed in Chapter 6, the community had little choice and resorted to the option of voicing their dissatisfaction by requesting a policy change which would enable a wider local autonomy related to activities in schools after school hours. When the direct approach to Board did not bring about the expected result, the community attempted to attract support from other community leagues, the Federation of Community Leagues, Parks and Recreation and eventually City Council. The 'voice' served not only as a means of expressing dissatisfaction with the situation but also of identifying their supporters of the cause among similar groups across the city. This is in line with other findings in the study of the organizational set which suggest that organizations use

other organizations to develop coalitions in support of mutual causes (Aldrich, 1979; Aldrich and Whetten, 1981).

The 'voice' resulted in a polarization of positions of the Evansdale Community League and other selected community leagues who wanted to use alcohol during social functions and introduce bingo as part of a fund-raising campaign strategy. Support for this 'camp' came from the administration of the Parks and Recreation Department and from City Council. On the other side was the Edmonton Public School Board (initially united) and a loyal group - the Edmonton Area Council of Home and School Associations - which also represented the cause of education and expressed support of the Board's position. Several community leagues and churches, as well as numerous teachers, principals and other professionals were also part of this "camp." Loyalty and availability of alternatives may be seen as the key factors in determining the mode of reaction to dissatisfaction with service - in this case, access to schools. Another factor which is noteworthy is the fact that while the case of prohibiting the consumption of alcoholic beverages in the community wings applied to two schools, the "voice" came from the neighbourhood which was characterized by single home dwellings and was considered to be upper-middle-class in terms of socio-economic characteristics. The fact lends support to the hypothesis that strongly voiced opposition from neighbourhoods characterized as belonging to the middle and upper socio-economic classes is more likely than from neighbourhoods in the lower socio-economic category. The hypothesis is also supported by the Public School Board's experience with school closure. This phenomenon may reflect the local residents' knowledge of

the political structure and their ability to express themselves effectively.

The Metasystem Structure

Analysis of the three conflicts within the metasystem reported in Chapter 6 lends support to the existence of at least three functionally differentiated levels or systems within the metasystem. Beer (1979) constructed a model for analyzing an enterprise and identified five functionally differentiated systems. Rees (1983) consolidated these five systems into three and suggested that they were characterized respectively by strategic, administrative and operational activities. In the study of an interorganizational collectivity, three levels were proposed to guide the researcher in investigating the properties of interorganizational collectivities: (a) the institutional level, responsible for governance of the overall goals; (b) the managerial-administrative level, which integrates the differentiated but interdependent operational level, and (c) the technical, operational level, consisting of the instrumental productive units.

Despite the fact that a number of characteristics suggested to describe a collectivity did not apply in the case study (e.g., significance of goal, integration, consistent values) the three functionally separable levels (Rees, 1983) were evident in the three conflicts examined in Chapter 6. Trustees of the Edmonton Public School Board did take an independent position from the administration. They did not support the framework recommended for incorporation of the concept in the system nor did they support the recommendation to extend the number of community school pilot projects and the summer use of schools. The

conflict over the consumption of alcoholic beverages appeared to be "handled" solely at the institutional level with the Board administration operating in a reactive mode. This may reflect the significance attributed to the issue by trustees. While no record of expressions of views or reports from the administration on the alcohol issue was found, the City administration took the opportunity to express their views through the media and was instrumental in advancing their desired position to the institutional level. The third controversy which focused on land ownership was technical in nature and required significant involvement of the administration in the analysis of options and their implications. The same could be said about the City since the introduction of the land use by-law originated with the City's Planning Department.

Notwithstanding the tension and the disagreements at the institutional and administrative levels, it appears that, at the technical level, the three focal organizations continued to operate cooperatively. School sites were acquired, designed, developed and maintained and it appears that the recognition of the benefit of cooperation to the general public was so evident that members of the metasystem continued to implement the agreement although it was under review. Naturally, this must have been done with the knowledge and consent of the management level.

Based on the findings on the metasystem structure, one can hypothesize that the involvement of the institutional level during a period of disequilibrium is more extensive than during a time of equilibrium. Furthermore, when the conflict is complex in nature and requires technical understanding, the institutional level resorts to

support from the administrative level. When elements in the metasystem maintain constant relationships, the managerial and the technical levels dominate the interaction among the organizations.

Evolution of Interorganizational Relations

A number of writers in the field of interorganizational relations have attempted to rationalize the co-operation among organizations. Van de Ven (1976) proposes two factors associated with the emergence of inter-agency activities: the first one is an internal need for resources and a commitment to an external problem or opportunity. This need is described in the Resource Dependency Model (Homans, 1974; Blau, 1964). The model stresses that organizational bonding occurs because organizations require access to critical resources in order to achieve their goals. The second reason reflects the System Change Model which ~~emerges out of an~~ awareness of changing need priorities, resource distribution channels or power relationships in the environment. Van de Ven (1976) compares the two situations and states that:

the first reason is generated internally within organizations to achieve their self interests, while the latter is externally stimulated with information about problems, needs and opportunities in the overlapping domains of organizations. (Van de Ven, 1976, p.307)

The reasons for co-operation in this case study changed with time and were reflected in the content of the several Joint Use Agreements. The first one, signed in 1959 by the City and the Public Board was limited to the ownership, development and maintenance of senior high schools and stemmed from the recognition that co-operation would result in increased efficiency for both parties. The agreement signed in 1966 included a third party - the Edmonton Roman Catholic Separate School District. It

introduced an exchange in which the school boards would construct, operate and maintain school buildings and facilities and make them available for the City's programs free of charge. Examination of the reasons for which each party entered into such an exchange suggests that each party benefitted in some way from the agreement. Parks and Recreation's rationale reflects Van de Ven's (1976) second reason- awareness of changing needs and priorities. The Boards recognized increasing demand by a number of groups in the community for improved accessibility to school facilities. At the same time, the school districts also realized a financial benefit by shifting expenditures for design, development and maintenance of school grounds to the City.

The literature suggests that Federal agencies in the United States often use the threat of withholding funds in order to force both the establishment of co-operative networks and their participation in joint programs. Coercive measures were also in place in Alberta. The new Planning Act, 1971, introduced a condition for eligibility for reserve land - an agreement with the municipality to make schools available for community activities after school hours. By that time, a Joint Use Agreement was in effect in Edmonton and this was a factor in the Board's desire to maintain the agreement. In the Planning Act of 1977, this section was amended following pressures from a number of school boards including the two signatories to the Joint Use Agreement in Edmonton.

Finally, in the late 1970's, the agreement was used to solve a major controversy over land. A land use by-law which was introduced by the City had the effect of zoning all schools under the Urban Service category, which meant downgrading the value of the properties held by the boards and limiting their marketability. The agreement was used to

guarantee that the city would purchase property declared by the Board to be surplus to its needs.

Dimensions of Interorganizational Relations

Several dimensions have been suggested for the study of linkages between and among organizations. Hall (1977) describes the nature of interorganizational relations using three variables: frequency of interaction, formalization of relationships, and the co-operative or conflictual nature of the relationship. Marrett (1971) derives a conceptual framework for analyzing linkages among organizations. She proposes four dimensions: the degree of formalization, intensity, reciprocity and standardization. Andrews (1978) applies the first three dimensions and incorporates standardization as one of the indicators of formalization. The present study focused on the reason(s) for having a formal agreement and on the intensity and reciprocity dimensions.

The question, "Why was a formal agreement necessary?" was perceived to be a straightforward one and the researcher expected to receive a similar answer. The findings were somewhat different. It appears that the rationale changed with the circumstances and reflected the time period during which an individual was involved with the Joint Use Agreement, the organization he represented and his area of involvement. The perceptions regarding the reasons for entering a formal agreement included:

1. Maintaining the co-operation beyond the existing administrations (perception related to the early agreements).
2. Establishing agreed-upon areas of responsibility (view expressed by trustees of both school boards).

3. Complying with the requirements for debenture borrowing by the city (mentioned in the preamble of the 1970 agreement).

4. Following the requirements of the 1970 Planning Act which indicated that an agreement between the school authority and the municipality for the use of schools by the community was a condition for eligibility to receive reserve land.

5. Guaranteeing the return to the city of land declared surplus by the boards.

6. Overcoming the difficulties generated by the Land Use By-law which 'downgraded' school sites and rendered them less marketable.

While Marrett (1971) suggests that in social welfare settings and other human service organizations, informal, tacit, arrangements occur quite frequently, in this case of an interaction between two educational organizations and one which provided recreational services, a formal agreement was chosen as a preferred course for the reasons mentioned above. The extent of the commitment of the parties involved may have been a significant factor in establishing the level of formalization.

Intensity, which refers to the extent of the organizations' involvement was the second dimension examined. Marrett (1971) distinguishes between two indicators of intensity: (a) the amount of resources committed, and (b) the frequency of interaction.

The second and third dimensions - intensity and reciprocity - appeared to be closely related in the case study. Intensity refers to the extent of involvement by the organizations in the metasystem while reciprocity describes the extent to which the interaction between the studied organizations is symmetrical.

The Joint Use Agreement emphasized the requirement that each party maintain a record of expenditures associated with the agreement so that the extent of financial reciprocity could be reviewed. Notwithstanding this requirement, the parties have not kept a detailed record of their costs. Since the City's operational expenditures are relatively high, it preferred to use the Incremental Costing Method which focuses on all the costs which would not have been incurred if the Joint Use Agreement were not in effect. The School Boards argued that the Full Costing Method should apply since they had significant capital expenses and this method includes, in addition to the incremental costing, the cost of administration and debt retirement. Calculation of costs revealed differing degrees of different asymmetry, depending on the method of calculation used. Therefore the parties could not agree and decided to abandon the idea of monitoring costs. The data for 1976 suggested a total commitment of about 1% of the organizations' total budget and the extent of the asymmetry reflected about 10% of the combined commitment.

The External Environment

The significance to an organization of the environment in which it functions has been expressed in numerous publications on organizational-environmental relations (Dill, 1958; Emery and Trist, 1965; Terreberry, 1968; Aldrich, 1979), interorganizational interaction (Levine and White, 1961, Litwak and Hylton, 1962; Guetzhof, 1966; Marrett, 1971; Benson, 1975) and in formulations of the contingency theory in the 1960's (Lawrence and Lorsch, 1967; Thompson, 1967). One of the concerns in the study of organizational environment is its conceptualization or how to think about it (Perrow, 1979).

This study delineated the environment on the basis of two variables: function and geographical location. Organizations, groups and individuals operating within the City of Edmonton and whose activities pertained to the content of the Joint Use Agreement were considered to be within the boundary of the metasystem. Beyond these boundaries operated the external environment. It included the general environmental context such as technical, economic and political conditions which Hazenfeld (1983) suggests must be considered as a given factor because very rarely can a single organization alter it. The external environment included the provincial government and parts of the focal organizations whose activities did not relate to elements of the agreement.

The examination in Chapter 7 of the three aspects - The Commission on Educational Planning, the provincial community school program and the West-10 experimental project - revealed that the metasystem did not operate in isolation and that the external environment was an important factor in understanding organizational and interorganizational behaviour. Including the source of the metasystem's powers within the external environment as was done in the present study may not be applicable to systems where the "parent company" frequently intervenes in the operation of its subsidiary.

The City's and the Public Board's briefs submitted to the Commission on Educational Planning revealed the wide variance in the respective views regarding the relationship between the schools and the community. This was an example of attempts from within the metasystem to influence the external environment. There was an understanding that this external environment could, in return, influence issues on which there was a disagreement within the metasystem. The Commission, for example, called

for the establishment of community councils with decision-making power over school operation. The community involvement in the school operation and the improved community access were the focus of the Provincial Interdepartmental Community School Committee. These initiatives were familiar to the parties to the agreement, however the Commission did not mandate changes. The actual use of power by the external environment came in the form of a new Planning Act in 1971 which set a condition for school boards' eligibility to receive reserve land - the existence of an agreement between the school authority and the municipality to provide the community with access to the schools. Following strong opposition from school jurisdictions, this requirement was subsequently eliminated in the Planning Act of 1977.

The introduction of an experimental project in the integration of human services was an initiative examined as part of the activities within the external environment which had a potential impact on the Joint Use Agreement. The city was a major force behind the West-10 project and support was requested from senior governments as well as the two school boards. All the above activities within the external environment had elements which had the potential of limiting the School Boards' power and authority and therefore, the Boards took a very cautious position with regard to them. They formed a significant part of the environment when the Joint Use Agreement was negotiated in the early 1970's, and while it was not possible to pinpoint the exact effect on the positions taken by the boards, it was suggested that they were "in the back of the minds" of those who were reluctant to enter a prescriptive agreement that guaranteed a shift of control from the Boards to the Community.

Practical Implications

The effective and efficient utilization of public resources is important to the public at large, which elects representatives to City Council and the School Boards and financially supports the services they provide. The desire for improved efficiency and effectiveness was a major factor that led to co-operation among the focal organizations. The following points and suggestions are derived from the findings of the case study and have practical implications for enhancing such co-operation.

1. A forum is needed for all members of the metasystem - including groups and individuals - in which perceived problems could be discussed and views exchanged regarding the implementation of the Joint Use Agreement. (For example, community league representatives and school principals could be included.) This does not necessarily mean participation in the Joint Planning Committee meetings but could include interaction on a regional basis.

2. The period of the early 1970's was a very dynamic one for the focal organizations, all of which were under significant pressure. The Joint Planning Committee as a co-ordinating mechanism was ineffective in problem-solving and did little to bridge the gaps among the parties in conflict. Representatives on the committee remained loyal to their respective organizations and, by and large, expressed the official position of the organizations. In such conflictual circumstances, an independent, impartial body (or individual) which is acceptable to all parties and which is skilled in conflict resolution may be more useful than a committee limited in its representation to individuals from each of the focal organizations.

3. During a period of equilibrium, the Joint Planning Committee can operate quite well. Attention has to be given to the issue of membership on the Committee. It is essential for the effective work of the Committee that appointment consider the position of the individual in the organization, the area of responsibility and the individual's balanced view of the interests of the three parties. It is only natural that the interests of the 'home' organization will be represented, however, sensitivity to the needs of the general public and understanding of the different perspectives are important for maintaining a spirit of co-operation. Committee involvement in such activities as policy development and problem-solving would suggest that senior administrators should be represented since it is more likely that individuals in a higher position could make a decision or take a stand that would bind their organization without frequently having to consult with others prior to making a decision.

The use of subcommittees to address specific technical or operational issues is useful and could prevent the constant complaint in the 1970's that the Committee was "bogged down" with insignificant operational concerns.

4. There is a need to search for an efficient means of opening the schools to the public. Centralized management tends to value consistency above effectiveness and efficiency. It would attempt to limit accessibility to schools on the grounds of security requirements rather than search for creative ideas to enhance the community access to schools. The researcher believes that decentralizing the management of community use of schools to principals would provide schools with first line responsibility for the relationships with that segment of the

community which pays education taxes but does not receive services in return. This approach of individualized service provides for direct accountability and monitoring of user and community satisfaction. As indicated in the description of the case study in Chapter 3, this segment of the population has experienced rapid growth during the study period, and its attitude towards the schools is important for the continued financial support of public education.

Public satisfaction with access to schools is also important for the long-term stability of relationships between the boards and the City. School board personnel have to recognize that the expenditure of funds to facilitate and encourage community use is not a charitable contribution and that, in return, the City provides for the schools to use city facilities, develops and maintains all school sites and provides the Board with the title to all school sites - in most cases at no cost. Therefore, the cost of community use should be viewed as part of the Boards' commitment in the exchange under the Joint Use Agreement and a worthwhile investment as far as the general public is concerned, rather than as an expenditure of questionable value to the organizations.

The Edmonton Public School Board decided to decentralize the booking of school use by the community to school principals on a voluntary basis commencing in September 1986. This approach which was advocated by the researcher is also supported by Emery and Trist (1965), who suggest that decentralization to the level where the operation is taking place is necessary in circumstances where the environment is dynamic and is described as 'disturbed, reactive'. This proposed solution requires careful consideration of a number of factors: (a) the possible alienation of Parks and Recreation which may find little benefit from the

agreement if the "control over booking is taken away from it; (b) principals' willingness to be responsible for the facility 24 hours per day, 365 days a year; (c) confusion among the approximately 1,500 current users and other potential users regarding the schools that have chosen to administer the booking locally (about 2/3) and those that preferred a centralized system (about 1/3). While reducing or eliminating redundant activities may be perceived as a positive course of action it may highlight an imbalance in the exchange under the Joint Use Agreement as indicated above and therefore may require the support of the Parks and Recreation Department.

5. Emphasis should be placed on the goals, standards and results of the joint endeavour. It is significant for all levels of the metasystem to have clear directions, to know what is expected and to periodically examine the results achieved. A semi-annual meeting of the chief executive officers of the participating parties could be an appropriate forum for the review of such reports. The results should also be communicated widely in order that the general public, its representatives and the members of the metasystem recognize the results and are aware of the efforts made by the parties to utilize their resources in an efficient and effective manner and maximize the utilization of public facilities.

Further Research

Like other writers in the field of interorganizational relationships, Zeitz (1975) states that much work remains to be done in order to develop a theory of interorganizational relationships which takes full account of their integral place in community and societal structure. Support for further study on interorganizational relations which would provide

empirical data and facilitate formulation of theory has been voiced by many writers in the field (Van de Ven, Emmett and Koenig, 1974; Van de Ven, 1976; Perrow, 1979; Whetten, 1981). Critics of the trends in the analysis of interorganizational relations state that research should not be limited to the identification of general patterns based on readily available published data sources, but should include qualitative or expressive aspects of options which provide insight into the process (Laumann et. al., 1978; Hall and Clark, 1973). Whetten, for example, suggests that "we know considerably more about the frequency of interlocking directorates than about their substantive meanings" (Whetten, 1981, p.4).

The recommendations for further research are of two types. The first is associated with the specific case study of the Joint Use Agreement. As indicated in Chapter 3 the researcher had to narrow down the study and leave some elements which had been part of the initial design for future research. The second group of research recommendations is related to general research topics in the field of interorganizational relations which stem from the findings of this study.

The implementation of the Joint Use Agreement, including the daily operation of the metasystem could be the focus of another case study. It could follow Van de Ven's (1976) suggestion that exploration of interorganizational relations should include: (a) identification of the metasystem; (b) the metasystem process, and (c) the metasystem structure. While the findings of this study could serve as the basis for the metasystem identification, studying the process leading to goal attainment could include:

1. Developing a flow chart of activities. Members of the metasystem could be used as data sources for revealing the nature of the activities, their sequence and those responsible for accomplishing them. The flow chart would also enable the delineation of the mechanism in place for attaining the metasystem goals and the identification of gaps or redundancies in the process.

2. Mapping the resource flow. This is another procedure that may provide some insight into the interaction process. Evan (1966) and Van De Ven (1976) suggest that following the resources that enter the system as input, that are transformed within the metasystem, and that depart as output to the environment would enable the understanding of the process leading to goal achievement.

3. Studying the perceptions of clients and those involved in the provision of the service regarding the processes used in the implementation of the Joint Use Agreement. Whetten (1981) supports this emphasis, stating that researchers have typically approached studies of interorganizational relations from the perspective of the elite in the system under investigation and very few studies have examined the coordination from the point of view of the client, taxpayer, or organizational staff members.

4. Analyzing the impact of the distribution of power on the efficacy of the system's performance (see Lauman, Galaskiewicz and Marsden, 1978). In September of 1986, the Edmonton Public School District commenced a decentralized booking procedure by which after hours community use of schools is co-ordinated at the school level. This provides an opportunity to compare the performance and client satisfaction in a centralized system as administered by the Edmonton

Separate School District and a decentralized system in operation at the Public School District.

5. Extending the study of formalization beyond questioning the reason for having a formal agreement to include the study of the policies, rules and procedures governing the activities within the metasytem.

While the process focuses on activities contributing to goal attainment, structure refers to the administrative arrangements established to define the role relationship among the members of the metasytem. The recommended studies that would provide further insight into the structure of the metasytem. The recommended studies that would provide further insight into the structure of the metasytem are as follows:

1. Aggregation of goal-oriented activities into subsystems in order to delineate the structural configurations of the metasytem. The present study identified three functionally differentiated systems or levels within the metasytem - the institutional, the administrative and the technical level - and suggested that the nature of interaction within them may vary from one level to another even during the same period of time. A systematic analysis of the activities within each level would be expected to provide additional insight into the structural dimensions of the metasytem (see Van de Ven, Emmett and Koenig, 1974; Rees, 1983)

2. The operation of the co-ordinating mechanism - the Joint Planning Committee - in the 1980's. The researcher identified a number of concerns relating to the structure of this body during the 1970's. The Committee has met more consistently in the 1980's, and an analysis of its operation could shed some light on its role and performance as co-

ordinating mechanism and advisory body to the Superintendents of the respective school boards and the General Manager of Parks and Recreation. The minutes of the monthly meetings, reports submitted to the Committee and interviews with present and past members of the committee could be important sources of data.

Additional recommendations for further research reflect the findings of this case study. In general, it is suggested that additional qualitative studies be undertaken in the field of interorganizational relations in order to enrich the empirical data and enable further theorizing in the field. Although such studies are time-consuming and require major efforts in the data collection stage, the insight gained is significant in advancing the knowledge regarding relations among organizations. Proposed areas of further research include:

1. Is the nature of interorganizational relations among organizations which are interdependent and integrated different than those which are independent and where the relationships are considered to be of the joint venture variety rather than a partnership or collectivity?

2. Does the level of interdependence affect the behaviour of an organization?

3. Would the integration of educational and recreational services be beneficial to the general public? If so, what are the obstacles to implementing such an integrated model and what strategies could be employed in advancing the integration of these services?

4. Are findings from the study of interlocking directorates in the private sector applicable to phenomena in the public sector? The researcher found that a number of individuals have shifted positions

within the metasystem during the study period. For example, individuals who formerly held senior positions with the Edmonton Social Planning Council became the provincial Minister of Education, a City Alderman, and a Director with the Parks and Recreation Department. How do such changes affect the operation of the metasystem?

Summary of the Chapter

This chapter indicated that a number of the requirements which define a collectivity did not apply to the case study, which was more of a joint venture than a partnership. The conceptual framework of a metasystem was useful in understanding the interaction, which was not limited to the focal organizations but included a number of other groups and individuals which together formed the metasystem.

The metasystem's external environment was found to be dynamic but it did not use coercive powers to force a change within the metasystem. The school boards which were aware of activities within the environment were very cautious with regard to a change in balance of control within the metasystem. They jealously protected their boundaries and defended the interest of the education of children - their primary goal.

Providing a forum for exchange of views and ideas at the local level and emphasizing the articulation and communication of the goals, standards and results of the joint venture were major suggestions for improving the implementation of the Joint Use Agreement. Finally, the recommended areas for further research included focusing on the process and the actual implementation of the agreement and, at a more general level, engagement in studies of interorganizational relations using

qualitative research methodology which would enhance the empirical data necessary for theorizing in this field.

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REPORTS AND PUBLICATIONS



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APPENDICES

APPENDIX I

JOINT USE AGREEMENT 1970

THIS AGREEMENT made in Sextuplicate this 17th day of December, A.D. 1970.

BETWEEN:

THE CITY OF EDMONTON, a Municipal
Corporation (hereinafter called
the "City"),

OF THE FIRST PART,

- and -

THE EDMONTON SCHOOL DISTRICT NO. 7,
(hereinafter called the "Public
School Board"),

OF THE SECOND PART,

- and -

THE EDMONTON R.C. SEPARATE SCHOOL
DISTRICT NO. 7 (hereinafter called
the "Separate School Board"),

OF THE THIRD PART.

WHEREAS it is the purpose of the City of Edmonton through the Parks and Recreation Department to develop, construct, operate and maintain Park and Recreation land and facilities for Park and Recreation purposes, and to organize and administer public recreation programs; and

WHEREAS the Public School Board and the Separate School Board (herein called the "Boards") have adopted a policy of making school buildings and grounds available for community recreation purposes, provided there is no conflict with the operation of school activities; and

WHEREAS it is the wish of the City and the Boards to use these facilities for the maximum benefit of the community; and

WHEREAS an Agreement for the joint use of facilities was entered into among the parties and was dated 31st January, 1966, and this agreement has worked satisfactorily from the standpoint of the parties, but it is defective for debenture borrowing purposes since the said Agreement prior

to execution did not receive the prior assent of the Minister of Education as is required by Section 92 of The School Act, so the parties have no agreed upon the terms of a new Agreement that will be executed if and when it is approved by the Minister of Education;

NOW THEREFORE THIS AGREEMENT WITNESSETH that the parties hereto agree together as follows:

1. That the Boards shall purchase outright and hold title to those portions of senior high school grounds upon which school buildings are located together with the area necessary for lawns and landscaping immediately adjacent to the school buildings and that the portion of the grounds required for school sports and athletics and public recreational purposes shall be purchased and held jointly by the City and the Boards.

2. (1) That on junior high and elementary school sites the Boards shall purchase outright and hold title to the sites required for all school purposes and the grounds required for school sports and athletics.

(2) That the City shall purchase outright and hold title to all lands required for public park and recreational purposes to be acquired whenever possible adjoining such junior high and elementary school sites.

3. (1) That a Joint Planning Committee is hereby established and shall consist of two officials from each of:

The City Parks and Recreation Department,

The Edmonton Separate School Board, and

The Edmonton Public School Board

to be appointed by the respective Superintendents.

3. (2) That the Joint Planning Committee shall be responsible to the City and the Boards in carrying out the following duties:

(a) implementing the terms of this Agreement and co-ordinating all

matters related thereto.

- (b) recommending policies and developing regulations with regard to the use of facilities, both buildings and sites.

4. (1) That the Boards shall construct, operate and maintain school buildings and facilities at their expense and shall make available such buildings and facilities or parts thereof to the City on weekends, holidays and school days after 6 p.m. until 11:30 p.m. or such time as may be regulated by the Joint Planning Committee; provided that arrangements may be made for Cubs, Brownies and other young children's activities at certain schools after 4 p.m. on any school day or at such times on other days as the Joint Planning Committee deems proper.

(2) That the City shall receive use of such buildings, facilities or parts thereof free of charge in the operation of its public recreation programs whether operated directly or through the agency of City sponsored or approved volunteer, non-profit associations, clubs or groups.

5. (1) That the City shall construct, operate and maintain Park and Recreation areas, buildings and facilities at its expense and shall make such areas, buildings and facilities or parts thereof available to the Boards on school days from 8 a.m. to 6 p.m. except in the case of outdoor hockey rinks and arenas which shall be available from 8 a.m. to 4 p.m.; provided that the periods available to the Boards are scheduled to ensure maximum use by the Boards and the City in a manner such as the Joint Planning Committee deems proper.

(2) That the Boards shall receive use of such areas, buildings and facilities or parts thereof free of charge in the operation of their programs;

6. That the City shall pay the cost of planning, developing and

maintaining school grounds, including fences, goal posts, and like sports structures in the grounds of the schools and will in general maintain boulevards, but excepting any ornamental front areas, sideyards and boulevards that abut the school building which shall remain the responsibility of the particular school.

7. That in planning school buildings the Boards shall provide for maximum community use and the City shall pay the cost of those portions of new buildings and additions to existing buildings which provide for specific City recreational purposes as approved by the parties hereto.

8. That the City and the Boards shall continue to carry public liability insurance under their various policies.

9. That the cost of property damage arising out of the misuse of the buildings and facilities by any party to this Agreement shall be assessed to and paid by the party responsible for the activity from which damage results.

10. Records of costs and program operation shall be kept by each party to provide data for the review of the Agreement.

11. This agreement shall remain in force (after approval by the Minister of Education) from the date of its execution by the parties until it is amended or terminated. If amendment or termination is proposed, each party to this Agreement shall be given at least thirty (30) days prior notice of such intention.

12. On the date of execution of this Instrument any previous Joint Development and Co-operative Development Agreements executed by the parties will be deemed rescinded.

IN WITNESS WHEREOF the parties hereto have executed this Agreement on the day and year first above written.

SIGNED, SEALED AND DELIVERED

in the presence of:

I hereby approve the terms of agreement pursuant to section 92 of The School Act.

APPROVED this 6 day of

October, 1970.

"T.C. BYRNE"
DEPUTY MINISTER OF EDUCATION

THE CITY OF EDMONTON

MAYOR.

CITY CLERK.

THE EDMONTON SCHOOL DISTRICT NO. 7

CHAIRMAN.

SECRETARY-TREASURER.

THE EDMONTON R.C. SEPARATE SCHOOL DISTRICT NO. 7

CHAIRMAN

SECRETARY-TREASURER

APPENDIX II
JOINT USE AGREEMENT 1980⁸

Chief Commissioner

BYLAW NO. 6214

A Bylaw to amend the Parks/School
Joint Use Agreement

WHEREAS on 1979 06 26 City Council approved the Parks/School
Joint Use Agreement;

AND WHEREAS on 1980 04 23 City Council, through Bylaw 5769,
authorized the appropriate officials of the City to execute the Joint Use
Agreement, being Appendix "B" to Bylaw No. 5769.

AND WHEREAS after execution of the Joint Use Agreement the
parties have decided to amend Clause 1.15 of Schedule "A" of the Joint Use
Agreement.

NOW THEREFORE the Municipal Council, being duly assembled, enacts
as follows:

1. The Joint Use Agreement, being Appendix "B" to Bylaw 5769 is
amended as follows:

Clause 1.15 of Schedule "A" to the Parks/School Joint Use
Agreement is amended by deleting from the end of that Clause the
following words:

"or up to the end of twenty (20) years, whichever is sooner"

2. Council hereby authorizes the appropriate officials of The City
of Edmonton to execute an agreement to amend Clause 1.15 of Schedule "A" to
the Parks/School Joint Use Agreement in accordance with this Bylaw.

READ a first time this 24 day of September A.D. 1980;

READ a second time this 24 day of September A.D. 1980;

READ a third time and duly passed by Council this 24 day of September
A.D. 1980.

THE CITY OF EDMONTON

Mayor.

City Clerk.

THIS AGREEMENT made in Sextuplicate this 16 day of October A.D. 1980
Agreement to amend Joint Use Agreement made the 2nd day of July, 1980.

BETWEEN:

THE CITY OF EDMONTON, A Municipal
Corporation (hereinafter called
called the "City"),

OF THE FIRST PART,

- and -

THE EDMONTON SCHOOL DISTRICT NO. 7,
(hereinafter called the "Public
School Board"),

OF THE SECOND PART,

- and -

THE EDMONTON R.C. SEPARATE SCHOOL
DISTRICT NO. 7 (hereinafter called
the "Separate School Board"),

OF THE THIRD PART.

WHEREAS on 1979 06 26, the Municipal Council of the City approved
the Parks/School Joint Use Agreement;

AND WHEREAS on 1980 04 23 the Municipal Council of the City,
through Bylaw 5769, authorized the appropriate officials of the City to
execute the Joint Use Agreement, being Appendix "B" to Bylaw No. 5769.

AND WHEREAS all parties to the Joint Use Agreement have executed
the said Joint Use Agreement, but the Agreement has yet to receive the
approval of the Minister of Education.

Subsequent to execution of the Agreement by the City, it was
agreed between all parties to the Agreement that Clause 1.15 of Schedule
"A" should be amended.

NOW THEREFORE THIS AGREEMENT WITNESSETH that the parties agree

together as follows:

1. Clause 1.15 of Schedule "A" to the Parks/School Joint Use Agreement, dated the 2nd day of July, A.D. 1980, is amended by deleting from the end of that Clause the following words:

"or up to the end of twenty (20) years, whichever is sooner".

THE CITY OF EDMONTON

MAYOR

CITY CLERK

THE EDMONTON SCHOOL DISTRICT NO. 7

CHAIRMAN

SECRETARY-TREASURER

THE EDMONTON R.C. SEPARATE SCHOOL
DISTRICT NO. 7

CHAIRMAN

SECRETARY-TREASURER

I hereby approve the terms
of this Agreement pursuant
to Section 92 of The
School Act.

APPROVED this 2nd day of
February, 1981

MINISTER OF EDUCATION

Chief Commissioner

BYLAW NO. 5769

A Bylaw to authorize the execution of the
Parks/Schools Joint Use Agreement

WHEREAS Section 118 of the Municipal Government Act, being Chapter 246 of the Revised Statutes of Alberta, provides that the Council may pass a bylaw authorizing the making of an agreement with the Board of Trustees of the School Districts for the Joint construction, ownership, maintenance, operation or use of a public work or building; and

WHEREAS the City has negotiated a Joint Use Agreement with the Edmonton School District No. 7, and the Edmonton Roman Catholic Separate School District No. 7, for the joint use of school and park facilities; and

WHEREAS the Council considers such agreement to be a benefit to the City of Edmonton.

NOW THEREFORE the Council duly assembled enacts as follows:

1. The Council hereby ratifies the agreement between the City of Edmonton, the Edmonton School District No. 7, and the Edmonton Roman Catholic Separate School District No. 7 providing for the joint use of parks and schools site, which agreement and Schedule thereto is attached hereto as Appendix "A" entitled "Parks/School Joint Use Agreement", and Appendix "B", entitled Schedule A to Parks/School Joint Use Agreement".
2. The Council hereby approves those amendments to Schedule "A" of the Joint Use Agreement outlined in Appendix "C" attached hereto and forming part of this Bylaw.
3. The Council hereby authorizes the appropriate officials of the City of Edmonton to sign and seal the said agreement as amended.

READ a first time this 25 day of March, A.D. 1980;

READ a second time this 25 day of March, A.D. 1980;

READ a third time and duly passed this 23 day of April, A.D. 1980.

THE CITY OF EDMONTON

Mayor.

City Clerk.

THIS AGREEMENT made in Sextuplicate this day of

BETWEEN:

THE CITY OF EDMONTON, A Municipal Corporation (hereinafter called the "City").

OF THE FIRST PART,

- and -

THE EDMONTON SCHOOL DISTRICT NO. 7 (hereinafter called the "Public School Board").

OF THE SECOND PART,

- and -

THE EDMONTON R.C. SEPARATE SCHOOL DISTRICT NO. 7 (hereinafter called the "Separate School Board").

OF THE THIRD PART.

WHEREAS it is the responsibility of the City of Edmonton, through Edmonton Parks and Recreation to plan, develop, construct, operate and maintain park and recreational land and facilities for recreational purposes, and to organize and administer public recreational programs;

WHEREAS it is the responsibility of the Public School Board and the Separate School Board (herein called the "Boards") to develop educational programs and provide the necessary facilities and sites for these programs.

WHEREAS the three (3) parties support, to the extent possible, the extension of their services to the total community, including community leagues and others, and encourage cooperation and coordination among these agencies to better meet the educational and recreational needs of the community.

WHEREAS it is the desire of the three (3) parties to use their resources and facilities in the most efficient manner for the maximum benefit of the community; and

WHEREAS the City and the two (2) Boards agree that the costs (as defined in Schedule "B") incurred in respect to joint use of facilities will be kept by each party and reviewed annually by the Joint Planning Committee, with any recommendations for assessment and control of costs and usage of facilities to be made by that committee to the respective Superintendents for resolution by the parties to this agreement:

NOW THEREFORE, THIS AGREEMENT WITNESSETH that the parties agree together to the following:

1. (A) That a Joint Planning Committee be established to implement the terms of the Agreement shall consist of two (2) representatives from the Edmonton Public School Board, Edmonton Separate School Board, and Edmonton Parks and Recreation.
(B) That the Joint Planning Committee serve in an advisory capacity to the Superintendents in recommending policies and developing regulations with regard to the coordination of programs, and the development and use of facilities and sites.
2. That each Superintendent appoint within his respective organization the necessary personnel for the effective implementation of the Agreement.
3. That the terms of Acquisition and Disposal of land between the parties hereto shall conform with Schedule "A" attached hereto and made part of this Agreement.
4. (A) That the Boards in planning school sites and facilities shall liaise with the City to provide for City and community use.

- (B) That the City in planning recreational sites and facilities shall liaise with the Boards to provide for school and community use.
5. (A) That the Boards shall construct, operate and maintain school buildings at their expense and shall make available to the City such buildings or parts thereof as specified in the Regulations Governing Use of Schools.
- (B) That the Boards, at their expense and in consultation with the City, shall be responsible for the development and maintenance of the building sites including the ornamental front and side yards which abut the school buildings in the Parks/Schools Site Standards.
6. (A) That the City, at their expense shall construct, operate and maintain park and recreational areas, buildings and facilities, or parts thereof and shall make available to the Boards such areas, buildings and facilities or parts thereof, as specified in Regulations Governing Use of Edmonton Parks and Recreational Facilities.
- (B) That the City at their expense and in consultation with the Boards shall be responsible for the planning and design of the Parks/School sites as outlined in the Parks/Schools Standards.
The design of the school sites shall be subject to the approval of the respective Boards.
- (C) That in cases where special consultants are required for planning and design of Parks/School sites, the cost shall be subject to a negotiated agreement between the Boards and the City.
- (D) That the City, at their expense in consultation with the Boards be responsible for planning, development and maintenance of

school grounds, including boulevards as outlined in the
Parks/School Site Standards.

7. That property damage or loss arising out of the use of buildings and facilities by any party to this agreement shall be assessed to and paid by the party responsible for the activity, as specified in:
 - (a) Regulations Governing Use of Schools
 - (b) Regulations Governing Use of Edmonton Parks and Recreational Facilities.
8. That any proposed changes in the following regulations:
 - (a) Parks/School Site Standards
 - (b) Regulations Governing Use of Schools
 - (c) Regulations Governing Use of Edmonton Parks and Recreational Facilities.

will be presented to the Joint Planning Committee for their consideration and recommendations.

9. This agreement shall remain in effect from the date of its execution by the parties involved until it is terminated by any party to this agreement giving a minimum of ninety (90) days prior notice of such intention.
10. On the date of execution of this Instrument any previous Joint Agreement executed by the parties will be deemed rescinded.

IN WITNESS WHEREOF the parties hereto have executed this Agreement on
the day and year first above written.

SIGNED, SEALED and DELIVERED

in the presence of:

I hereby approve the terms of
this agreement pursuant to
Section 92 of The School Act.

APPROVED this 2nd day of
February, 1981

MINISTER OF EDUCATION

THE CITY OF EDMONTON

MAYOR

CITY CLERK

THE EDMONTON SCHOOL DISTRICT NO. 7

CHAIRMAN

SECRETARY-TREASURER

THE EDMONTON R.C. SEPARATE SCHOOL
DISTRICT NO. 7

CHAIRMAN

SECRETARY-TREASURER